

## Request for Proposals

### ***Public Relations and Communications Contractor or Contractors***

Released November 5, 2018; proposals due November 28, 2018, at 5 p.m.

#### **1. Introduction**

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c)(3) corporation, is issuing a Request for Proposals (RFP) for a Public Relations and Communications Contractor or Contractors (Contractor(s)). The selected Contractor(s) will work with Energy Trust to support a variety of public relations, communications and stakeholder outreach activities, with the goal of educating and engaging consumers, businesses and stakeholders on Energy Trust services, results and impacts.

The Contractor(s) will develop and execute public relations and communications strategy, related efforts and campaigns that increase customer participation and public awareness of programs and the benefits of energy efficiency and renewable energy. All activities will be guided by and reinforce the organizational public relations and marketing plans, and program marketing plans. The Contractor(s) will help Energy Trust identify, build and maintain relationships with media, and suggest and propose stories (paid and unpaid) of interest to motivate consumers and businesses to participate in programs and to inform stakeholders and customers of Energy Trust purpose and results. The Contractor(s) will serve as a resource advising on strategic and crisis communication events, producing written materials and coordinating customer events. Additionally, the Contractor(s) will identify opportunities to expand awareness and engagement in Energy Trust programs for all eligible customers through communication and public relations efforts.

Through this RFP, Energy Trust also seeks social media services, including but not limited to, audience and content audits; paid campaigns; unpaid, promotional content; content calendaring; reporting; strategy and best practices.

The Contractor(s) will be a key resource for public relations and communications strategies as Energy Trust strives to meet aggressive energy-efficiency and renewable energy generation goals, and ensure its programs meet the needs of all customers, including those with lower incomes, those in rural communities and communities of color.

Energy Trust will review responses for the ability of the Contractor to quickly understand the dynamic energy industry and Energy Trust's role in that industry, as well as the plan of the Contractor(s) for maintaining an ongoing understanding of organizational and program needs and priorities, which can rapidly shift. Energy Trust will look for a Contractor(s) who can cost-efficiently demonstrate strategies and tactics to achieve a level of working knowledge akin to staff or a co-located "embedded" resource, and who has experience coming up-to-speed quickly on technical subjects, such as energy, and finding ways to translate for a general audience.

It is Energy Trust's intention to solicit proposals from respondents with communications and public relations capabilities. Energy Trust is open to responses from multi-person firms or sole proprietorships, and may consider awarding contracts to one or more Contractors based on the skills and services demonstrated in the responses. There is an incumbent firm currently providing a portion of the services in this RFP. When examining proposals, preference will be given to firms that demonstrate experience working with nonprofits and public agencies seeking to engage diverse and underserved audiences. Agencies with Oregon-based staff able to meet in-person without travel costs are sought.

In 2017, Energy Trust issued a Diversity, Equity and Inclusion Operations Plan that outlines 10 focus areas intended to integrate diversity, equity and inclusion throughout the organization. One of the focus areas is to increase contracting opportunities for diverse businesses. Respondent's evidence of good faith efforts to integrate focus on diversity, equity and inclusion into their RFP response will be considered in the evaluation of responses.

Energy Trust will require support and project work on various projects throughout the year to fulfill Energy Trust public relations and communication goals for programs and the organization. Depending on demonstrated skills and strengths of the selected Contractor(s), the total budget for the Scope(s) of Service will range from \$60,000 - \$120,000 in 2019 with potential to expand or contract as needs change.

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

- Public relations strategy that advances organizational (corporate) goals and program (energy savings/generation) goals while ensuring integration and leverage between them
- Broad communications strategy, including strategic communications
- Demonstrated experience in cultivating and maintaining relationships with reporters and bloggers
- Proactive media pitching, press release development, talk point development, spokesperson preparation and media engagement
- Reactive media response, strategy and engagement
- Crisis communications counsel
- Integrated public relations campaigns
- Writing, including technical writing, persuasive writing, messaging, speech writing and social media
- Customer and stakeholder event coordination and promotion
- Social media campaigns
- Social media account content and audience auditing, strategy, audience development and reporting
- Social media reputation management
- Media tracking and reporting
- Media and presentation training
- Regular attendance at communications planning and status update meetings
- Development and maintenance of working knowledge of program and organizational objectives and challenges
- Organizational tools, including calendar and administrative reports

## **2. Background**

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

Energy Trust is an independent nonprofit organization, selected and overseen by the Oregon Public Utility Commission, to lead Oregon utility customers in benefiting from saving energy and generating renewable power. Our services, cash incentives and solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save nearly \$3.2 billion on their energy bills since 2002. The cumulative impact of our leadership since 2002 has been a contributing factor in our region's low energy costs and in building a sustainable energy future. More information about Energy Trust's background, funding sources, strategic and action plans, policies and programs are available on our website at [www.energytrust.org/about](http://www.energytrust.org/about).

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

Energy Trust's 2015-2019 Strategic 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 customers' return on investment
- Test and introduce new, efficient technologies faster
- Leverage synergistic collaborations and pursue projects that yield multiple customer benefits

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

*Residential customers (includes renters and homeowners in manufactured homes, apartments, condos and single-family homes)*

- Likely to have knowledge of ways to conserve energy, but in need of trusted sources.
- Engage directly with contractors during an energy upgrade or solar installation 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.
- Energy Trust targeted offers provide opportunity for moderate-income customers to participate, and Energy Trust is looking for additional opportunities to reach underserved customer segments, including communities of color and rural communities.

*Business customers (includes multifamily property managers and owners, small, medium and large commercial and industrial businesses, commercial developers, nonprofit organizations, government agencies, farms and wood products)*

- Respond to the strategic business case for investment in energy efficiency and solar.
- Want to work with someone who understands their unique business needs and demands on their time.
- May not know where to start thinking about their energy use. May lack technical knowledge to make choices without help.
- Payback period is most important to them.
- Seek counsel from qualified experts. Industrial and large commercial customers want a long-term relationship with an energy expert acting as a member of their team.
- Some see value in marketing green/sustainable practices.
- Small and medium-sized businesses, and businesses in rural areas, represent an important market for Energy Trust.

*Renewable energy customers (includes small-scale hydropower and biopower; solar customers fit into 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 either moving a project through the development cycle and/or making a project viable.

- Have varying levels of technical knowledge and feasibility studies inform investment decisions.
- Are likely to have projects with benefits beyond energy generation (e.g., water conservation, waste management).

*Stakeholders (includes utilities, peer organizations, community-based organizations, government agencies and elected officials)*

- Have varying goals and objectives, some of which are supported or answered by clean energy activities, including those delivered by Energy Trust.
- Look to understand how Energy Trust programs can serve their customers or constituents.
- May be involved in Energy Trust operations (i.e., membership on an advisory council, providing expertise in the development of a program offering).

### ***Current public relations and communications strategy***

Energy Trust seeks to engage customers, stakeholders and communities through several channels as outlined below. Energy Trust also provides information to stakeholders through regular reporting, outreach and responses to frequent information and data requests.

#### *Public relations*

Energy Trust has a variety of public relations needs, including planning, proactive and reactive public relations, media training, organizational communications and speech writing. This work covers a broad range of topics and activities and can be high volume at times. Contractor to develop and support public relations strategy for residential programs, business programs and organizational needs. Contractor also provides quarterly media tracking and reporting on media coverage.

#### *Program communications and promotion*

Energy Trust program communications and promotion span a breadth of customer types with different motives and values. Contractor will support communication and promotion of program initiatives and pilots, and participant successes and experiences working with Energy Trust, as well as education and awareness building. Program marketing and creative services are provided through separate contracts and are not sought as part of this contract.

#### *Stakeholder communications and strategy*

Energy Trust is committed to providing visibility and transparency in operations and results. Contractor will support broad communication of results and impacts to the public and stakeholders, recommending channels for consideration and supporting implementation.

Energy Trust communication staff also provide support for large communication projects emerging from program need, public, regulatory or stakeholder interest in Energy Trust, energy efficiency or renewable energy generation. Contractor may assist with the development of communication tools or strategy related to these larger communication efforts.

#### *Energy Trust website and social media properties*

Energy Trust's website ([www.energytrust.org](http://www.energytrust.org)) is a primary customer and stakeholder engagement channel. In addition to offers for consumers and businesses, the website houses information on energy efficiency and renewable energy topics. A web agency provides design, development and user experience services, and in-house staff manage digital strategy and website content. These web services are not sought as part of this contract.

The site, along with Energy Trust's e-newsletter content (blog), targeted marketing email, Facebook, Twitter, Instagram and LinkedIn are leveraged for public communications and program promotion. Contractor may be engaged to identify communication strategies and activities and develop content utilizing these channels to meet public engagement, program and outreach objectives.

#### *Outreach, sponsorship and events*

In addition to outreach staff assigned to specific programs, Energy Trust has general outreach staff that support the Energy Trust presence in eastern and southern Oregon and maintains a community relations presence in Portland and the Willamette Valley. Sponsorships and events are outreach activities that can be leveraged to generate awareness and highlight customer and project successes and action in specific communities or with certain customer groups. Contractor may be involved in the media strategy and execution around some of these events and possibly event logistics and coordination.

### **3. Proposal Requirements**

Proposals shall include detailed information relating to the following categories submitted to Energy Trust in accordance with the schedule below in no more than 10 pages:

- Your firm's background, proficiency and approach to the Scope of Services sought as described above in **Section 1**, including with respect to account management, project management, budget management, intake and discovery.
- Experience developing public relations plans that target stakeholder, industry, residential and business consumers with the intent to spur specific, desired actions, as well as experience in crafting effective media message strategy for media inquiries or media stories.
- Track record of generating media placement in local, statewide or national media outlets, detailing medium and outlet, in terms of advertisement equivalent cost of placement, responses and other measures of success.
- Relevant experience in developing communications and public relations materials that reach underserved communities, communities of color, low-to-moderate income communities and rural communities, and how that experience aligns and advances Energy Trust's diversity, equity and inclusion operations plan.
- Relevant industry experience (environmental, sustainability, energy efficiency, renewable energy, behavior change, nonprofit, utility and public sector).
- Past work for current and previous clients, including creating outreach, public relations and other engagement campaigns that engage a variety of types of consumers and communities as well as to small to large business markets.
- Strategies and tactics to achieve a level of working knowledge akin to staff or a co-located "embedded" resource, and experience coming up-to-speed quickly on technical subjects, such as energy, and finding ways to translate for a general audience.
- Experience of individuals that will comprise the Contractor team, including names, titles and hourly rate.
- Efforts and experiences in integrating diversity, equity and inclusion internally in your firm, both in staffing and contracting for services. Note whether your firm is COBID-listed and/or whether your firm is woman or minority-owned.
- Provide a pricing proposal, by time and materials or with alternative pricing, such as a retainer arrangement.
- Provide contact information (company/individual name, title, phone number, email and address) for three professional references regarding your relevant experience.

- Specify the date through which the proposal is valid. At a minimum, proposals shall be valid for 180 days from the proposal receipt deadline (see below).

In addition, provide the following as attachments, which are excluded from the page limit:

- Disclosure of any direct or indirect, actual or potential conflicts of interest with Energy Trust.
- Three to five varied samples relevant to the Scope of Services sought.
- A signed and completed Representations and Signature page (**Appendix A**).

#### 4. Contractor Selection Criteria

Proposal selection will be the sole responsibility of Energy Trust and will be undertaken at the sole discretion of Energy Trust. Proposals may be eliminated from consideration at Energy Trust's sole discretion for any reason, including but not limited to:

- The proposal is substantially incomplete or exceeds page limits.
- The proposal is not responsive to the objectives and requirements of this RFP.
- There is evidence of financial instability of the firm or team.
- The proposal is inconsistent with Energy Trust policies or requirements.
- A conflict of interest exists.

Proposals will be evaluated by but not limited to the following criteria:

- Completeness of proposal, and content addressing the proposal requirements
- Demonstration of executing Scope of Services with evidence of success for residential, business, industry, stakeholder and public audiences.
- Relevant experience working with nonprofits and public agencies seeking to engage diverse and underserved audiences.
- Demonstration of media relationships at the local, state and/or trade level to support success.
- Experience and approach to developing compelling messaging, media, social media and outreach plans that reach residential, business, industry and stakeholder audiences, as well as income-constrained Oregonians, rural communities and communities of color.
- Relevant experience of individuals, and individuals as a part of a team.
- Ability to come up-to-speed quickly on Energy Trust and develop and maintain working knowledge of program and organizational objectives and challenges.
- Reasonable cost.

#### 5. Schedule and Instructions for RFP Submission

Responses must be submitted electronically, in PDF format, to Hannah Cruz at hannah.cruz@energytrust.org by November 28, 2018, at 5:00 p.m. A maximum length of 10 pages will be accepted, not including the Representations and Signature Page (**Appendix A**) or work samples. Energy Trust will examine all responses carefully.

##### **Schedule**

Post to website and distribute RFP	November 5
Proposals due	November 28
Inform finalists	December 5
Finalist interviews	December 7 - 12
Inform selected Contractor	December 14

Development of scope of work and contract will then commence with the intention to conclude by January 31, 2019.

## **6. Resulting Contract**

The selected respondent or respondents will be required to execute a written contract with Energy Trust to perform Contractor services as determined between Energy Trust and the selected respondent(s). No award will be considered a commitment, and no obligations or legal relations shall exist between Energy Trust and the selected respondent(s) until a final and binding written contract has been executed by and between Energy Trust and the selected respondent(s).

Contract pricing and budget may be structured as time and materials with a not-to-exceed contract cap or with alternative pricing, such as a retainer arrangement. Key terms in any resulting contract include, but would not be limited to, the following: Appropriate business licensing, timely and accurate invoicing requirements, intellectual property provisions ensuring the work product developed for Energy Trust by the Contractor or its subcontractors shall be the property of Energy Trust, use of Energy Trust consent forms when referencing Energy Trust participant or project information, conflict of interest disclosure requirements, confidential information nondisclosure requirements, indemnification for third-party claims and limitation of liability provisions, and insurance requirements.

Time is of the essence with regard to these services and prolonged contract negotiations will not be undertaken. In general, Energy Trust strongly prefers contracts that are consistent with Energy Trust's standard terms and conditions; negotiations for such contracts can generally be completed quickly. In some cases, a few terms and conditions may need to be substituted or waived, in accordance with contract negotiations. Any party involved in these contract discussions can terminate negotiations at any time and for any reason. If it appears that contract negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

## **7. RFP Governing Provisions**

### ***Agreement to All Terms***

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

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

This RFP 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 RFP at any time in its sole discretion. This includes the right to cancel this RFP 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 RFP shall become the property of Energy Trust and shall not be returned to the respondent.

### ***Confidentiality***

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

### ***Respondent Expenses and Waiver of Claims***

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.

Respondent waives any right it might have to bring a claim against Energy Trust, its Board of Directors, employees, contractors or agents with respect to any matter arising out the RFP.

### **8. Energy Trust Rights Reserved**

Energy Trust reserves the right, in its sole discretion, to reject any or all proposals in whole or in part, to waive any minor irregularities or informalities in a proposal, and to enter into any agreement deemed to be in its best interests. In addition to any other enumerated reserved rights and/or options as stated in this RFP, Energy Trust may in its sole discretion do any one or more of the following:

- Determine which proposals are eligible for consideration in response to this RFP.
- Disqualify proposals that do not meet the requirements.
- Negotiate with respondents to amend any proposal.
- Select and negotiate and/or enter into agreements with respondents who are most responsive to the RFP and whose proposals best satisfy the interests of Energy Trust and not necessarily on the basis of price alone or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFP at any time and/or issuing a modified or new RFP that would supersede this one.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further RFP process on any terms and conditions.
- Enter into relationships with more than one respondent.

**APPENDIX A  
REPRESENTATIONS AND SIGNATURE PAGE  
(Submit this page as the first page of the proposal)**

I, the undersigned declare that;

1. I am an authorized agent of the respondent and have authority to submit this request on behalf of the respondent.
2. The information provided in this proposal is true and correct to the best of my knowledge.
3. I have read this Request for Proposals in its entirety and agree unconditionally to all of its conditions and requirements. Including but not limited to, the RFP Governing Provisions.
4. The respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham proposal.
5. The respondent has not solicited or induced any other person, firm or corporation to refrain from proposing.
6. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. The respondent's proposal is genuine; not made in the interest of, or on behalf of, any undisclosed person, firm or corporation; and is not submitted in conformity with an agreement of rules of any group, association, organization or corporation.
8. I understand and accept that the approval or rejection of respondent's proposal is within the sole discretion of Energy Trust and that there is no legal commitment until all due diligence has been performed and a properly authorized contract has been duly and properly executed.
9. I authorize the representatives of Energy Trust to investigate the business history of the respondents, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
10. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while respondent's proposal is under consideration.

***The information contained in this proposal and any part thereof, including its exhibits, schedules and other documents and instruments delivered or to be delivered to Energy Trust, is true, accurate and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Energy Trust as to any material fact.***

**Date:** \_\_\_\_\_

**Respondent Firm Name:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_