



## **REQUEST FOR QUALIFICATIONS (RFQ)**

### **Media Buying Services**

#### **Traditional, Programmatic Digital, and Search Engine Advertising**

Energy Trust of Oregon, Inc. (“Energy Trust”), an Oregon non-profit 501(c)(3) corporation, is seeking qualifications from Respondents for media buying services as described below. Respondents may provide information on any of the three services listed, and Energy Trust may choose different respondents for any of the three services. Energy Trust expects to enter into two-year contracts for the three media buying services with the selected Respondent(s).

#### **1. Energy Trust Overview**

Energy Trust is an independent nonprofit organization dedicated to energy efficiency and renewable power development. Energy Trust’s services, cash incentives, and solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista save more than \$8.2 billion on their energy bills. Since 2002, the organization’s leadership has been a contributing factor in the 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).

#### **2. RFQ Background on Media Buying Services Sought**

The purpose of the RFQ is to find a media buyer(s) to place advertising across the state, with particular focus on rural areas and communities of color and, upon identification of qualified media buying service providers, enter into contract(s) for those services. The primary objective of the services sought is to raise awareness of Energy Trust’s offerings and motivate customers to act, particularly among communities of color and moderate income customers. Energy Trust plans on entering into contract (s) with the selected media buyer(s) for two years, with the potential for two additional one-year renewal extensions.

This work can be approached in three parts, with respondents choosing to provide information on their qualifications in all or some of the following areas: traditional advertising (radio, broadcast television, print, and outdoor), programmatic digital (all digital that is purchased based on target audiences rather than specific websites), and search advertising (Google search management). Respondents interested in search advertising may request additional information on current practice from Shelly Carlton at [shelly.carlton@energytrust.org](mailto:shelly.carlton@energytrust.org)

Energy Trust will provide the overall advertising strategy, targeting information, and advertising goals, but the media buyer will contribute subject matter expertise to refine and adjust strategies. Campaign development and execution is the work of multiple teams, and the media buyer will be involved in collaborative work with other agencies. The media buyer will use information provided by Energy Trust or other agencies to develop recommendations for advertising placement as outlined below. Energy Trust will review each proposal, provide feedback, and approve placement.

Energy Trust runs brand, B2B and B2C ads and will provide all creative assets to the agency for trafficking. The advertising budget for 2021 is roughly \$1.5 million and is expected to remain at that

level for the next three years. Energy Trust will provide budget splits between brand, B2B and B2C advertising content. Energy Trust generally runs two campaigns per year, one in the Spring and one in the Fall. There may be additional, smaller campaigns or more editorially focused media buying in addition to the three main campaigns. More detail is contained in Energy Trust's objectives for media buying services in 2021, and those objectives are listed on **Appendix A** attached.

#### **4. RFQ Schedule**

Statements of qualifications are accepted from October 21<sup>st</sup> until November 2<sup>nd</sup>, 2020 at 5:00 p.m. Energy Trust will examine all responses carefully.

Responses containing the required information outlined below must be submitted electronically, in PDF format, to Shelly Carlton at [shelly.carlton@energytrust.org](mailto:shelly.carlton@energytrust.org).

#### **5. Submission Requirements**

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:
  - a. Describe the respondent's primary business, location of office(s) and contact information.
  - b. Disclose any blended rates associated with the services you provide. Specifically include total yearly costs for services described in this RFQ.
  - c. List relevant experience with media planning and purchasing and with respect to the services sought and Energy Trust's objectives for 2021.
  - d. List any experience or subject matter expertise in:
    - i. Marketing for local, national or international nonprofits or aid organizations
    - ii. Cross-cultural/multicultural marketing and media strategies
    - iii. Social good, racial or environmental justice or public awareness campaigns
  - e. Describe how you incorporate diversity into your client services, particularly as it relates to project staffing and the capture of multiple perspectives.
  - f. Describe experience particular to reaching communities of color, low-income customers, and rural communities. 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.
  - g. Disclose whether the respondent is Oregon COBID listed or minority or women-owned
  - h. 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):
  - a. Provide templates for advertising planning and reporting
  - b. Provide samples of trafficking schedules and processes

#### **6. Governing Provisions**

All submitted proposals are subject to the following governing provisions:

*A) Agreement to All Terms*

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

*B) 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 to purchase goods or services with any 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.

*C) 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.

*D) 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.

*E) 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.

## *Appendix A: 2021 Media Buying Services Objectives*

The following objectives and services are planned for 2021 as Energy Trust strives to expand participation and meet aggressive energy-efficiency and renewable energy generation goals.

### Advertising Primary Objective

- Raise awareness of Energy Trust offerings and motivate customers to act, particularly among communities of color

### 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

### Programming and timing recommendations for TV and radio

- Schedule recommendations

### Invoicing and budget tracking

- For Invoices:
  - Traditional media: Provide two invoices per month
    - One for pass-through media costs with backup information that includes media company, run dates, cost and totals organized by ad creative/campaign
    - A second invoice for fees associated with media purchase
  - Digital programmatic: One invoice with strategies, impressions, organized by ad creative/campaign
  - Search advertising: One invoice with management cost, total search engine charges and cost-per-click

### 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 ended
- Media buyer will be given access to Google Analytics for reporting purposes
- Reporting will include data identified for each campaign, 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