

Energy Trust of Oregon

Request for Qualifications

Solar outreach and education to reduce soft costs, increase access and provide consumer protection

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Energy Trust of Oregon, Inc. (Energy Trust), an Oregon non-profit, 501(c)(3) corporation, is seeking qualifications from solar electricity consumer education and outreach providers with experience in the Oregon solar market.

Energy Trust Overview

Energy Trust is an independent nonprofit corporation organized to help carry out Oregon laws requiring utilities to dedicate revenues to energy efficiency and renewable energy development. With an annual budget of approximately \$160 million, our mission is to “change how Oregonians produce and use energy by investing in efficient technologies and renewable resources that save dollars and protect the environment.”

The Solar Electric Program (the “Program”) is one of Energy Trust’s renewable energy offerings. In order to develop the solar market across all sectors and gain long-term solar electricity generation to benefit the customers of PGE and Pacific Power in Oregon, Energy Trust has structured the Program to address the primary market barriers of cost, quality and awareness.

Energy Trust provides:

- Consumer outreach and education to help inform Oregonians about their solar options
- Cash incentives to eligible Program participants to reduce the above market costs associated with installing solar
- Above-code installation requirements for systems applying for Program incentives to help promote system performance and longevity
- A closed network of design firms and trade ally installers that are familiar with the Program requirements
- industry support in the form of trainings and cooperative marketing assistance for active trade allies

Diversity, Equity, and Inclusion

Energy Trust seeks to contract with organizations that share its commitment to building a diverse, equitable, and inclusive workplace and business environment and that apply a diversity and equity perspective to their work as outlined in this RFQ. As relevant, RFQ respondents are encouraged to indicate if their firm is certified with Business Oregon’s Certification Office for Business Inclusion and Diversity (COBID). Respondents are also encouraged to provide information regarding any state or federal certifications, awards, or recognition for any organizational policies and practices relating to Diversity, Equity, and Inclusion (DEI). Respondents may provide any relevant information describing DEI qualifications and experience as part of their submission.

RFQ Background & Desired Goals

Energy Trust is sensitive to the challenges facing solar contractors in the residential and small commercial sectors and seeks to decrease the customer acquisition cost to decrease the overall cost of solar for Oregon customers. Energy Trust recognizes that we are responsible for ensuring that all customers can access our services, including people with low and moderate incomes, communities of color and rural communities. The purpose of this RFQ is to provide Energy Trust with a qualified consultant(s) that can provide education and outreach to potential solar customers to raise their overall knowledge level on solar and connect them with appropriate next steps.

A list of specific training topics and knowledge areas that will be supported under this RFQ is provided below. Entities submitting responses to this RFQ (“Respondents”) are not required to

submit responses to all areas, and Energy Trust welcomes additional topic suggestions beyond those outlined to provide customer education and outreach.

Education and Outreach Formats

Through this RFQ, Energy Trust expects to identify contractors capable of supporting the organization's education and outreach goals through a variety of different formats. The education and outreach will be delivered by expert consultants familiar with Energy Trust and the Oregon solar industry. Energy Trust anticipates entering written contracts and then working with selected Respondents ("Selected Respondents") to create educational content and training that is valuable and pertinent to customers.

Selected Respondents may provide training and educational resources via webinars or other online format, in person events, one-on-one or through standalone materials as described below:

Educational Workshop Development

Developing effective in-person and virtual educational workshops to provide basic information on how solar technology works, share with customers options available to them to invest in solar energy, and help connect customers with the appropriate next steps to move forward on their solar journey. Selected Respondent may be asked to create customized educational workshop content in coordination with community-based organizations that represent and serve communities of color, customers with low incomes and rural communities. Educational workshop content could include, but is not limited to, the following subject areas: residential solar 101, commercial solar 101, community solar, solar 101 for low- and moderate-income households, solar plus storage, smart energy devices, net metering, dynamic rate structures, etc.

Educational Workshop Delivery

Delivering interactive in-person and virtual educational workshops to provide pre-approved information to help connect customers with information and the appropriate next steps to move forward on their solar journey. Selected Respondent will organize and publicize the workshops through online platforms (i.e. Eventbrite) and social media, manage all logistics in delivery of the workshops, and collect contact information and survey responses from all attendees.

Attending Educational Events

In-person or virtual representation of the Program as part of pre-approved community events throughout Oregon. Selected Respondent will coordinate with Energy Trust staff to identify appropriate events and coordinate with event organizers on attendance.

Solar in the Community Events

Creating opportunities to celebrate residential customers that have invested in solar for their homes can make solar tangible. Selected Respondent will organize and publicize events through online platforms (i.e. Eventbrite) and social media, manage all logistics in delivery of the events, and collect contact information and survey responses from all attendees. Solar in the community events could include but are not limited to solar homes tours, solar neighborhood events for residential new construction, etc.

Coordinating Project Showcase Events

Supporting the Program in celebrating the successful installation of large non-residential solar projects with ribbon cutting events or showcases to celebrate communities for their investments. Selected Respondent will coordinate with Energy Trust staff to identify events and will organize and publicize the events through online platforms (i.e. Eventbrite) and social media, coordinate with speakers selected by Energy Trust staff, and manage all logistics in delivery of the events.

Coordinate Geographically Focused Education & Outreach

Energy Trust works with communities around Oregon to encourage customers to adopt solar by running a modified version of the traditional "Solarize Campaign." Selected Respondent will coordinate with community organizations to develop customized content, organize and publicize educational and outreach events using online platforms (i.e. Eventbrite) and social media, manage all logistics in delivery of the events, and collect contact information and survey responses from all attendees.

Solar Networking Events

Networking events can provide informal educational opportunities on timely topics. Selected Respondent will organize appropriate speakers and publicize the events through online platforms (i.e. Eventbrite) and social media, manage all logistics in delivery of the workshops, and collect contact information and survey responses from all attendees.

Respondent Qualifications

Respondents should demonstrate the following:

- Documented experience in content development and maintenance
- Knowledge and expertise in the subject matter and content area(s) being targeted as well as delivery methods proposed
- Established linkages with the Oregon solar industry and experience in engaging businesses, industry partners and professional organizations
- Established linkages with community-based organizations to ensure the proposed sessions meet customers' needs
- Attendee evaluation method to track attendee ratings of presentation quality, remaining questions that can be incorporated into future training, and demographic information (may be attached as a supporting document)
- Employment of a learning management system that can provide Energy Trust with a report on specific information, e.g. attendance, date of training (may be attached as a supporting document)
- Description of any limitations in delivering in-person content around the state
- Description of any limitations in delivering and recording remote events for attendees around the state.
- Ability to provide high-quality presentation materials and activities that are required for success
- Suitable experience, staff, and infrastructure

Additional Requirements of Selected Respondents

All presentations, communications, and informational/marketing collateral developed to support the outreach work conducted (such as workshop invitations, handouts, emails to attendees, etc.) must have pre-approved content and be co-branded with Energy Trust's logo, unless otherwise requested, and must conform to Energy Trust's branding guidelines.

RFQ Schedule

Statements of qualifications are accepted on an ongoing basis through **June 20, 2022**. Energy Trust will review Respondents' submissions and contact Respondents within thirty (30) days of Energy Trust's receipt of a complete submission.

For consideration, all submissions, including questions, must be emailed to: jeni.hall@energytrust.org.

Submission Requirements

Submissions should be no longer than six (6) pages, single spaced. Supporting documentation may be attached to the submission. Energy Trust encourages brevity and suggests that the submitted materials be organized in the following order:

- a) Respondent organization's name and address
- b) Primary representative's name, phone and email
- c) Education & outreach topic areas or formats
- d) Cost for services provided. Provide any information necessary to provide context (i.e. cost per event with a maximum number per year possible etc.)
- e) Any limitations as to where the events/presentations could be offered and/or any limitations in the ability to deliver and record remote events
- f) Description of presenters' qualifications to demonstrate Respondent's qualifications as

- identified above. If volunteer labor is used, describe the training provided to volunteers
- g) Description of Respondent's ability to reach communities throughout Oregon. Examples could include socialmedia followers, number of members, email list subscribers, relationships with community-based organizations, etc.
 - h) Provide any relevant information describing DEI qualifications and experience as part of their submission.
 - i) Disclosure of any direct or indirect, actual or potential conflicts of interest with Energy Trust or a statement that no such conflict of interest exists.

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. Additionally, Respondent hereby represents that 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.

Agreement to All Terms

By submitting a response to this RFQ, 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 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 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 RFQ.

Resulting Contract

Any final agreement on tasks to be performed as a result of this RFQ would be set forth in a written contract between Energy Trust and the Selected Respondent(s). No commitment, obligation, or legal relationship to purchase goods or services exists between Energy Trust and any Respondent until such written agreement is fully executed.