

# Energy Trust of Oregon

## Planning, Evaluation and Research Tasks

### Request for Qualifications (RFQ)

**RFQ Submission Deadline:  
December 31, 2026, 5 p.m. (PST)**

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## Introduction

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon non-profit, 501(c)(3) corporation, seeks qualifications from consultants with skills in qualitative research, quantitative research, engineering and measure analysis, and/or resource assessment and resource planning assistance to maintain a pool of qualified consultants for work on Energy Trust planning, evaluation, and research projects.

Consultants will be selected for the pool based on their submissions as requested in this RFQ. Consultants will be accepted into the pool on an ongoing basis through December 31, 2026.

## About Energy Trust

Energy Trust is a nonprofit organization selected and overseen by the Oregon Public Utility Commission to help utility customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista lower energy costs, increase energy savings and generate renewable energy. Since 2002, our cash incentives, technical support, education, and strategic partnerships have helped customers save billions of dollars on their energy bills and achieve their energy goals.

Energy Trust serves a broad range of partners, stakeholders and customers, including people with low and moderate incomes, communities of color and rural communities. In all cases, our vision—clean, affordable energy for everyone—is the north star that guides our planning, decision-making and communication. In everything we do, we seek to improve lives today while creating a sustainable future for generations to come.

Our program delivery model develops and strengthens an extensive Trade Ally Network comprised largely of small businesses that employ thousands across the state. This network installs energy-efficient equipment, weatherization, solar systems and storage and other clean energy improvements—work that boosts the infrastructure and skills of providers within the marketplace.

More information about Energy Trust's background, funding sources, strategic and action plans, policies and programs is available on our website at [www.energytrust.org/about](http://www.energytrust.org/about).

## RFQ Background

The purpose of the RFQ is to provide Energy Trust with a pool of qualified consultants who can quickly and easily respond to requests for planning, evaluation, and research projects.

Energy Trust plans to approve contractors for this pool that are qualified for any number of individual work areas as described later in this RFQ. Note that Energy Trust is not seeking contractors that are vendors of software or other IT tools and services.

Energy Trust plans to use this RFQ to select contractors for smaller research projects (less than \$100,000 each). Several of these projects are anticipated to occur each year. Larger projects (over \$100,000) will be contracted through public requests for proposals (RFPs), RFQs, or

requests for information (RFIs). In rare instances, projects may be sole-sourced based on unique firm qualifications.

While Energy Trust anticipates a distribution of assignments and funds, depending on the resources and expertise of the consultant pool, Energy Trust does not guarantee that any consultant selected for the pool through this RFQ will actually receive an assignment or funding for planning, evaluation, and research projects, which are described in more detail below.

Final contracts resulting from this RFQ would be expected to have terms of no longer than two years. Energy Trust will sometimes set up umbrella task order contracts so that resource assessment and resource planning tasks can be assigned and contracted for on an ongoing basis. Single-purpose contracts may also be set up for some larger tasks. Energy Trust contracting is subject to Energy Trust's Supplier Diversity Program (SDP) requirements: [https://www.energytrust.org/wp-content/uploads/2022/08/Supplier-Diversity-Program\\_v10-Final.pdf](https://www.energytrust.org/wp-content/uploads/2022/08/Supplier-Diversity-Program_v10-Final.pdf)

Completed work products may be posted and available to the public on Energy Trust's website (see <https://www.energytrust.org/about/our-impact/reports-financials/>).

**Evaluation and Research:** Energy Trust contracts for a wide variety of qualitative and quantitative research to inform program design and planning. Qualitative and quantitative research are also often performed as part of process and impact evaluations, which Energy Trust conducts for all of its major efficiency programs on a regular basis, and for renewable programs on an as-needed basis.

**Engineering and Measure Analysis:** Energy Trust contracts for a variety of engineering and measure analysis work. Much of this work is to provide engineering and analytical support to staff as they consider whether to approve new prescriptive energy efficiency measures as cost-effective under standard utility tests (total resource cost test and utility cost test, explained in Energy Trust's cost-effectiveness policy on the Energy Trust website, <https://www.energytrust.org/wp-content/uploads/2016/11/4.06.000.pdf>).

**Resource Assessment and Resource Planning Assistance:** Energy Trust contracts for a variety of work related to operating, updating, and expanding the capabilities of its *Analytica*-based Resource Assessment model that is used to estimate future energy efficiency potential, most often in conjunction with utility integrated resource planning (IRP) processes.

## RFQ Schedule

Statements of qualifications are accepted on an ongoing basis through December 31, 2026. Respondent submissions will be reviewed, and respondents will be notified of acceptance into the pool within 30 days of Energy Trust's receipt of a complete submission. Energy Trust may contract with contractors accepted into the RFQ pool on or after January 1, 2025.

Respondents may submit responses regarding any or all of the work areas described below. For example, they might choose to submit qualifications only for qualitative research. Or respondents may choose to submit qualifications for all of the work areas. Consultants accepted into the pool to be created as a result of this RFQ may also respond separately to larger

Energy Trust requests for proposals or qualifications. As noted above, this pool is eligible to receive contracts for tasks and projects under the work areas described below, but no contracts are guaranteed even once accepted into the pool.

Any questions may be directed to [evaluation@energytrust.org](mailto:evaluation@energytrust.org).

## Description of Work Areas and Possible Contract Tasks

Listed below are four broad work areas under which planning, engineering, evaluation, and research tasks and projects are categorized and that contractors may submit qualifications for, as well as some detail on the types of tasks that would likely be part of a project in a given work area.

### 1. Qualitative Evaluation and Research

Perform qualitative evaluation and research, which could include tasks such as:

- Performing a literature review
- Performing process mapping, customer journey mapping and/or logic modeling
- Performing sample design
- Designing survey instruments
- Designing focus group discussion guides
- Designing interview guides
- Designing other data collection approaches – e.g., ride-alongs, virtual diaries, etc
- Fielding surveys
- Conducting focus groups
- Conducting interviews
- Performing other data collection
- Performing qualitative data analysis
- Reporting of qualitative tasks and findings

### 2. Quantitative Evaluation and Research

Perform quantitative evaluation and research, which could include tasks such as:

- Performing sample design
- Designing survey instruments
- Designing other data collection approaches – e.g., metering, etc.
- Fielding surveys
- Performing other data collection
- Performing quantitative data analysis
- Performing billing analysis
- Performing engineering review of projects
- Performing calibrated building simulation modeling
- Reporting of quantitative tasks and findings

### 3. Engineering and Measure Analysis

Assist Energy Trust in analyzing or reviewing analysis of cost, savings, measure life, load shapes, and applications for potential energy efficiency measures, which could include:

- Developing or reviewing assumptions and/or tools (e.g., Excel-based calculators)
- Comparing to established sources
- Critiquing reliability
- Negotiating with Program Management Contractor and Program Delivery Contractor measure experts to reach agreement on assumptions
- Documenting findings
- Assisting with benefit/cost calculations
- Performing building simulation modeling

### 4. Resource Assessment and Resource Planning Assistance

Develop, update, review, and/or revise inputs to, and findings from, various energy simulation models. Tasks could include:

- Updating and/or expanding the capabilities of Energy Trust's *Analytica*-based Resource Assessment model
- Operating Energy Trust's Resource Assessment model
- Reviewing/verifying results of energy modeling exercises
- Modeling whole home/building energy savings from different energy efficiency measures
- Developing presentations for utility integrated resource planning meetings and presenting related materials at these meetings
- Advising on the development of new energy simulation models
- Assisting with calibration of energy simulation models
- Updating measure characterizations for modeling based on updated Energy Trust data and/or other data sources
- Researching and characterizing emerging technology measures
- Providing training on analysis and modeling protocols
- Developing, updating, and refining load and/or savings profiles

Contractors also periodically assist in developing new avoided cost estimates in collaboration with Energy Trust's five funding utilities and the Oregon Public Utility Commission.

## Submission Requirements

Responses containing the information, and in the format, required below must be submitted electronically only to [evaluation@energytrust.org](mailto:evaluation@energytrust.org).

### 1. Consultant qualifications and experience (up to 10 pages)

In this section, respondents should describe their qualifications and experience, including the following information:

- Respondent's primary business, length of time in business, and location of office(s).

- Contact information for respondent staff to whom Energy Trust should send inquiries about work related to this RFQ.
- The work area(s) for which respondent seeks to be considered.
- A summary of relevant project experience for the work area(s) for which respondent seeks to be considered, including dates and a brief description of the nature and scope of work performed.
  - Energy Trust is interested in respondent project experience demonstrating familiarity with national/regional energy and energy efficiency industry, and/or familiarity with markets and/or customer segments served by Energy Trust.
- A link to one or more examples of reports, portions of reports, or other work product(s) produced.
- Contact information for three references regarding relevant project experience.

Respondents may submit responses regarding any or all of the work areas described in “Description of Work Areas and Possible Contract Tasks” above. For example, they might choose to only submit qualifications for qualitative research. Or they can choose to submit qualifications for all of the work areas. It is not necessary to specify which types of tasks the respondent can do under each work area.

## 2. Diversity, equity, and inclusion qualifications and experience (up to 4 pages)

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 in planning, evaluation, and research as outlined in this RFQ. As part of Energy Trust’s Supplier Diversity Program, this RFQ requests information about firm certifications with Business Oregon’s Certification Office for Business Inclusion and Diversity (COBID), federal Small Business Administration, and/or non-certified statuses as veteran, BIPOC- and/or woman-owned businesses. Respondents must provide responses to each of the relevant questions in Appendix B, and respondents may provide other relevant information describing qualifications and experience related to promoting diversity, equity and inclusion. Specific responses to the questions in Appendix B do not determine whether respondent is accepted into this consultant pool, but may be used to select consultants to work on or bid on individual projects.

## 3. Information on staffing and rates (up to 25 pages)

In this section, respondents should include the following information:

- A list of key staff<sup>1</sup> that would be assigned to the types of contract scopes and tasks described in #1, above.
- Resumes, including relevant licenses, certifications, and training, as well as relevant experience, for key staff.
- Proposed rates and pricing for all of the work areas for which you are submitting a response. Energy Trust is interested in fully loaded hourly time and materials pricing for

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<sup>1</sup> For large firms, it is not necessary to list all staff. Contracts resulting from the RFQ may include staff whose names and resumes are not contained in respondent’s submission.

key staff members as well as alternative price structures. Please include proposed rates for work that would be performed in 2025 and 2026.

#### 4. Conflict of interest disclosure (up to 1 page)

In this section, respondents should 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.

#### 5. RFQ Response Cover Sheet and Signature Page (1 page)

Please complete and attach Appendix A: RFQ Response Cover Sheet and Signature Page.

### **Selection of Consultants for Planning, Evaluation, and Research Projects**

The typical process for selecting consultants for a specific planning, evaluation, or research project is described below.

In selecting a consultant (or a handful of consultants) to provide a bid for a statement of work, Energy Trust considers the following criteria:

- Qualifications of proposed staff
- Qualifications of firm
- Diversity, equity, and inclusion qualifications
- Supplier Diversity Program requirements

Energy Trust provides a statement of work to a consultant (or a handful of consultants) accepted into the RFQ pool, and asks the consultant or consultants for a bid, which includes:

- A budget detailing the number of hours, proposed staff (including any subcontractors), rates, and any other costs
- A short summary of qualifications to do the work described in the statement of work, proposed approach, and a rough timeline

In selecting a consultant to perform the work, Energy Trust considers the same criteria as above for selecting a consultant to bid, as well as the following criteria:

- Quality of the short summary of qualifications to do the work described in the statement of work, proposed approach, and a rough timeline
- Budget

## Resulting Contract

Respondents who are selected to work on a specific planning, evaluation or research project will be required to execute a written contract with Energy Trust to perform contractor services as determined between Energy Trust and the selected respondent, and the rest of this section applies to those resulting contracts, rather than to this RFQ. No award will be considered a commitment, and no obligations or legal relations shall exist between Energy Trust and the selected respondent until a final and binding written contract has been executed by and between Energy Trust and the selected respondent.

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.

## RFQ Governing Provisions

All responses to this RFQ are subject to the following provisions:

### 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.

### 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 firm. No commitment, obligation, or legal relationship exists between Energy Trust and any respondent until such written agreement is fully executed. It is anticipated that the term of any final, written agreement entered into as a

result of this RFQ would be through 2026. Such term could be extended, but only in writing and upon agreement of all parties.

## Confidentiality

Except in the case of litigation or other legal disclosure and/or audit requirements, Energy Trust will not disclose information submitted in response to an RFQ to any third party.

## Ownership of Responses

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

## No Verbal Addendums

Any clarification or interpretation of the RFQ documents shall be issued in writing by Energy Trust. No verbal agreement or conversation made or had at any time with any officer, agent or employee of Energy Trust, nor any oral representation by such party shall bind Energy Trust nor add to, detract from, affect or modify the terms of this RFQ. Any addendum to this RFQ will be in written form.

## Respondent Costs

Each response prepared in response to this RFQ will be prepared at the sole cost and expense of the respondent and with express understanding that there will be no claims whatsoever for reimbursement from Energy Trust.

## Waiver of Claims

Respondent waives any right it might otherwise have to bring any claim, whether in damages or equity, against Energy Trust, Energy Trust Board of Directors or any of Energy Trust's agents, employees or contractors, with respect to any matter arising out of any process associated with this RFQ.

## Energy Trust Rights Reserved

Energy Trust reserves the right, in its sole discretion, to reject any or all submissions 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 RFQ, Energy Trust may in its sole discretion do any one or more of the following:

- Disqualify responses that do not meet the requirements
- Issue additional subsequent solicitations for information or proposals, including withdrawing this RFQ at any time and/or issuing a new RFQ that would supersede and replace this one, or issuing a follow up solicitation
- Vary any timetable or schedule, add or change any provisions discussed herein

- Conduct any briefing session or further information gathering or solicitation process on any terms and conditions
- Suspend or modify the RFQ process at any time

### Conflict of Interest

Respondent shall disclose in its submitted response all direct or indirect actual or potential conflicts of interest it or any of its personnel may have with Energy Trust. A “direct or indirect conflict” is defined as any situation in which an individual has 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.

### Additional Information

Energy Trust may request additional information.

## Appendix A: RFQ Response Cover Sheet and Signature Page

I, the undersigned declare that:

1. I am an authorized agent of the respondent listed below after “Respondent Firm Name” (“Respondent”) and have authority to submit this submission on behalf of Respondent.
2. The information provided in this response is true and correct to the best of my knowledge.
3. I have read this Request for Information in its entirety and agree unconditionally to all of its conditions and governing provisions.
4. Respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham submission.
5. Respondent has not solicited or induced any other person, firm or corporation to refrain from proposing to this RFQ.
6. Respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. Respondent’s response 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 authorize the representatives of Energy Trust to investigate the business history of Respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
9. 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 response is under consideration.

**The information contained in this response 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 response 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: \_\_\_\_\_

## Appendix B: Diversity, Equity and Inclusion Qualifications and Experience

### Ownership

This section – questions 1-2 – applies to all respondents.

1. Indicate if respondent's firm falls into one or more of the categories present in the table below. Please check the box for all that apply and include a certification number where applicable.

	My firm is a...	My firm is seeking recognition as a...
COBID*: Emerging Small Business		
COBID*: Minority Business Enterprise		
COBID*: Women Business Enterprise		
COBID*: Service-Disabled Veteran Business Enterprise		
COBID*: Veteran Business Enterprise		
SBA**: Small Disadvantaged Business		
SBA**: 8(a) Business Development Program		
SBA**: Veteran and/or Service-Disabled Veteran Owned Small Business		
SBA**: Woman and/or Economically Disadvantaged Woman Owned Small Business		
SBA**: HUBZone Program		
Self-certified Minority, Woman or Veteran owned business		
Other: Business certified through one or more business inclusion and diversity programs that are not administered by Oregon's COBID Program or the SBA. If		

	My firm is a...	My firm is seeking recognition as a...
yes, indicate the certification(s) in the space provided below.		

\*Certified through Business Oregon’s Certification Office for Business Inclusion and Diversity (COBID)

\*\*Certified in this Federal Program administered by the Small Business Administration (SBA)

- a. If respondent’s firm has a COBID certification, please provide the COBID certification number.
2. **(Optional):** If your firm holds certification through a State (other than Oregon’s) business inclusion and diversity program or through a national business inclusion and diversity program that is not administered through Business Oregon’s COBID office, please indicate the certification held here.

### Evaluation and research experience

This section – questions 3-5 – applies only to respondents seeking to be approved for the Qualitative and Quantitative Evaluation and Research work areas.

3. Provide specific examples of how respondent has collected, analyzed, and reported disaggregated firmographic data to baseline, benchmark and/or track participation of small- to medium-sized, rural, and/or minority- and woman-owned business customers.
4. Provide specific examples of how respondent has collected, analyzed, and reported disaggregated demographic data to baseline, benchmark, and/or track participation of residential customers with low and moderate incomes, living in rural areas, and/or communities of color.
5. Provide specific examples of how respondent has ensured cultural competence<sup>2</sup> in research or work and/or performed community-based research or work.

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<sup>2</sup> The American Evaluation Association’s [Public Statement on Cultural Competence in Evaluation](#) provides a detailed explanation of cultural competence in evaluation. While this statement is focused on evaluation, Energy Trust believes the practices outlined in the statement are applicable to the planning, evaluation, and research tasks described in this RFQ.