Energy Trust of Oregon
Website Design, Development and Maintenance
Request for Proposals

RFP Submission Deadline:
August 21, 2023, 5:00 p.m. (PST)

Michael Fritz, Web Manager
421 SW Oak Street, Suite 300
Portland, OR 97204

michael.fritz@energytrust.org
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1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is issuing this Request for Proposals (RFP) for an independent contractor to perform web design, development and maintenance consultant services (Consultant). The successful Consultant will work with Energy Trust to maintain and enhance the existing energytrust.org WordPress website, WordPress blogs and Find A Contractor search tool in support of a variety of web-based marketing, communications and outreach efforts with consumers and businesses throughout Oregon and select communities in Southwest Washington. A successful Consultant will provide excellent customer service to Energy Trust staff, recommend forward-thinking design while understanding the environment in which Energy Trust operates and demonstrate good comprehension of the Energy Trust brand in its design and development efforts.

The resulting contract will be for one-year with one additional one-year extension option at Energy Trust’s discretion.

An incumbent firm has been providing the services described in this RFP since 2017. Energy Trust will examine all proposals carefully and with equal consideration.

Key Dates

Key dates associated with this RFP are listed below.

- RFP Posted: July 21, 2023
- Questions and requests for clarification due: August 1, 2023 5:00 p.m.
- Question and clarification responses posted by: August 9, 2023
- RFP response submission deadline: August 21, 2023, 5:00 p.m.
- Notification of respondent interviews: August 25, 2023
- Respondent interviews: Week of September 4, 2023
- Consultant selection and scope/contracting begins: Week of September 11, 2023
- Contracting complete/Work begins: January 1, 2024

All times listed are Pacific Time.

About Energy Trust

Energy Trust is an independent nonprofit organization selected and overseen by the Oregon Public Utility Commission (OPUC) to help Oregon utility customers save energy and generate renewable power. Energy Trust’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 $10.6 billion on their energy bills over time. The cumulative impact of the organization’s leadership since 2002 has been a contributing factor in the region’s low energy costs and in building a sustainable energy future.
Energy Trust is committed to advancing diversity, equity and inclusion by better meeting the needs of low- and moderate-income homeowners and renters, small businesses, and those in communities of color and rural communities who we have not successfully served. We design to increase access to information, services and incentives to increase participation across Energy Trust’s service territory. Some of this work is laid out in our Diversity, Equity and Inclusion Plan.

Energy Trust also supports supplier diversity in its procurement processes. Successful respondents must include a plan for subcontracting at least 20% of the value of the contract with Oregon Certification Office for Business Inclusion and Diversity (COBID) certified firms, unless the prime respondent is itself COBID certified. (see section 4.2 below for further details and requirements)

More information about Energy Trust’s background, funding sources, 2020-2024 Strategic Plan, annual budget and action plan, policies and programs are available on our website at www.energytrust.org/about.

About Energy Trust’s Website and Systems Environment

Energy Trust’s website serves as a tool to promote available services, programs, products, self-service tools and technical information to eligible utility customers as well as a learning resource for users who may not be eligible. Additionally, the website functions as a public information resource, archive, library and calendar for customers, internal staff, contractors and external stakeholders. Lastly, the website is a resource center for Energy Trust’s extensive Ally Network of contractors and professionals who install energy-efficient and renewable power technologies.

The current iteration of the website was designed in 2016 and launched in January 2017 on a WordPress Content Management System (CMS) platform. The move to wordpress allowed internal Energy Trust staff greater control over the site’s content, navigation, and publishing schedule. The website is also responsive to screen size, and

Beyond the website’s WordPress platform, Energy Trust utilizes three primary data systems – Microsoft Dynamics Great Plains, Microsoft Dynamics CRM, and a proprietary system called Project Tracking, a browser-based application utilizing IIS, built on a .NET backend and an AngularJS front-end. Website functions covered in the scope of this RFP only interact with one of these systems, Microsoft Dynamics CRM, via web services that Energy Trust maintains to serve data to the Find a Contractor Tool.

The organization also utilizes SharePoint for sharing documents, as a resource for employees, and to facilitate project team collaboration.

2. Digital Properties Included in this RFP Scope

The following list describes the high level characteristics, architecture and responsibilities for the digital properties covered in this scope:

- **Energy Trust Main Website** – Contains approximately 500 pages of content in addition to document and image libraries built on WordPress 6.1. Energy Trust web staff is responsible for management of the content and navigation controlled by the WordPress
CMS and provides direction to the consultant on desired design and development enhancements to the CMS and site architecture.

- **Insider Website** - Also developed on WordPress, this website functions as the primary communication channel with Energy Trust Trade Ally contractors, hosting more than 1,700 pages (including blog entries) of program updates and information necessary for trade ally contractors to work with Energy Trust. Similar to the main website, Energy Trust web staff is responsible for management of the content and navigation controlled by the WordPress CMS and provides direction to the consultant on desired design and development enhancements to the CMS and site architecture. The Insider CMS exists separately from the main website CMS.

- **Energy Trust Blog** – A WordPress blog that hosts updates about Energy Trust activities and expert insights across our primary audience groups. Similar to the main website and Insider, Energy Trust web staff is responsible for management of the roughly 900 pages of blog posts and navigation controlled by the WordPress CMS and provides direction to the consultant on desired design and development enhancements to the CMS and blog architecture. The Blog CMS exists separately from both the main website and Insider CMS.

- **Public Annual Report** – Built in the main website’s WordPress CMS, the design is refreshed annually by the Consultant.

- **Find A Contractor** – An interactive tool built on a PHP framework to help customers connect with Trade Ally Contractors and other program allies who can complete energy efficiency and renewable energy projects. The tool accesses and displays information about contractors stored in Microsoft Dynamics CRM via a REST web service that is maintained by Energy Trust IT staff. Energy Trust web staff provides product ownership and strategic direction for the tool and the Consultant is responsible for maintaining all user facing functionality and developing new enhancements as requested.

These digital properties host an average of 60,000 visitor sessions per month.

Analytics on the website are currently provided via Google Analytics and Energy Trust web team staff use Siteimprove to monitor quality assurance and accessibility compliance.

In addition, Energy Trust currently uses Mail Chimp to manage all newsletter and marketing email production and distribution and maintains a social media presence on Facebook, Twitter, Instagram, LinkedIn, YouTube and Vimeo. Though there are occasional intersections between these platforms, accounts and the Energy Trust website, the design, development or maintenance of them is NOT included in the scope of this RFP.

### 3. Scope of Work

It is anticipated that the selected Consultant will work with Energy Trust to fully define the scope of work; however, Energy Trust has identified the following core capabilities and services that must be addressed in respondent’s submitted proposal:

#### 3.1. Hosting, Security and Maintenance

- Act as a primary contact, in coordination with Energy Trust web staff, with web hosting provider (currently Pantheon) to maintain and ensure website server uptime
- Lead the discussion and collaborate with the hosting provider on SSL configuration and server configuration related to security.
• Secure development with best practices per OWASP and other sources in order to protect Energy Trust data
• Monitor all Energy Trust WordPress sites with a security plug-in, such as Sucuri; notify Energy Trust web team of suspicious activity
• Receive notifications from WP re: core security patches and confirm that existing auto-updates function; notify Energy Trust web team with confirmation. Patch on a monthly basis. Critical security patches applied within two weeks.
• Monitor WordPress plugin console multiple times per month for updates to specific plug-ins; install, test and deploy when an update is available
• Troubleshoot, provide maintenance, service custom built pages and interactive website elements and tools not accessible through the content management system
• Utilize a sprint-based development methodology for the planning, design, development, testing and deployment of new or modified code throughout the year
• Maintain separate testing and development environments to allow Consultant and Energy Trust staff to conduct testing and quality assurance. Follow Energy Trust change control procedures.
• Troubleshoot, provide maintenance and service support for content management system for issues reported by Energy Trust staff or discovered by Consultant
• Be responsible for all website related elements and processes past the server to ‘go live’
• Implement change orders, modifications and edits (in a back-up capacity) to Energy Trust web staff as requested
• Engage in periodic third-party security testing
• Ensure that as the website is used as communication platform, it is coordinated with current Energy Trust Information Technology systems as needed and requested – DNS, SPF, etc.
• Maintain a task ticketing and management system, such as Github, accessible to Energy Trust web and IT staff
• Provide customer service function to Energy Trust staff as needed, Monday-Friday 7am-6pm PST, via service level agreement (SLA). In some instances, weekend support may also be required such as during planned systems outages. Service would be provided primarily to Energy Trust staff and only to customers in rare instances, such as backing up Energy Trust staff who are on vacation. Most tasks will be assigned via email or the aforementioned ticketing system maintained by the Consultant. In instances of emergency or outage or for tasks requiring more detailed explanation, online calls will be used. We request a standard customer-based SLA and the number of cases per month is expected to be between 10 and 20.

3.2. Design and Development Services
Support organizational needs for new and enhanced tools, content and features throughout the duration of the contract. Because specific requirements for these projects are developed throughout the year, often in response to emerging needs, it is difficult to estimate the number of hours required. However, we typically require 50-100 hours of work in this category each month. Examples of projects anticipated for 2024, with approximate timing and effort, include:

• Redesign and development of the Energy Trust homepage to better reflect current business objectives and user needs, including clear pathways into high value content
like current or limited time offers, community based resources for underserved populations and annual results information of interest to stakeholders, approx. 100hrs. (Q2)

- Refresh of the Energy Trust public annual report microsite with new content and design, creating a new WordPress template that can be managed by Energy Trust web staff in future years, approx. 100hrs (Q2-Q3)
- Redesign and develop the Renewable Energy audience based on customer research, to better serve user needs and current business objectives, approx. 300hrs. (Q1-Q3)
- Enhance interactive communication tools on the main website, such as the Success Stories library and the DIY Tips and Resources, in response to customer and Energy Trust staff feedback/needs (Q1-Q4)
- Propose new features and enhancements to the Energy Trust main website based on industry best practices and emerging trends in digital communication, such as solutions for managing multi-language content, elevating the visibility of other content areas (i.e. the Energy Trust Blog), or highlighting opportunities to take better advantage of Google Analytics or A/B testing software (Q1-Q4)

3.4. Web Services Coordination and Online Tool Development

- Coordinate with Energy Trust web and IT staff to maintain existing connections between the Find a Contractor search tool and the REST web service with Microsoft Dynamics CRM
- Participate in collaborative sessions and provide feedback on any future web service integration enhancements led by Energy Trust IT staff, implementing changes as needed

3.5. Accessibility, Analytics and Other Support

- Ensure that all web design and development activities are in compliance with W3C’s Web Content Accessibility Guidelines 2.1 for levels A-AAA and support Energy Trust web staff and content owners by maintaining content management guidelines for accessibility compliance
- Support Energy Trust staff in implementing and evaluating event, goal and campaign tracking in Google Analytics as needed, and assist with the recent transition to GA4.
- Employ SEO best practices in all design, development and maintenance activities and support Energy Trust staff in evaluating and implementing SEO strategies for specific campaign activities as needed
- Support Energy Trust staff in implementing e-communications strategy by providing email template design and list management/segmentation assistance as needed
- Designate a point of contact to attend bi-weekly web coordination meetings in addition to maintaining a weekly check in schedule with Energy Trust web staff on active and upcoming projects

4. Submission Guidelines

Responses to this RFP must be organized according to the following guidelines and submitted by the deadline indicated in Section 1 (Key Dates). A maximum length of 20 pages will be accepted (see Section 4.2 below).
Respondents must submit all responses electronically via email to Michael Fritz, Web Manager at michael.fritz@energytrust.org. The electronic copy can be submitted as a PDF or secure Word file. Please clearly indicate “RFP Response” in the subject line of the email submission.

Questions or requests for clarification about this RFP must be submitted in writing. Verbal requests cannot be accommodated. Submit RFP questions and clarification requests via email to Michael Fritz at michael.fritz@energytrust.org by the due date indicated in Section 1 (Key Dates). Please clearly indicate “RFP Question/Request for Clarification” in the subject line of the email submission.

Energy Trust will post all written questions and answers to the RFP website page by the due date indicated in Section 1 (Key Dates).

Respondents may inquire about the status of their response (i.e. verify Energy Trust receipt) via email (michael.fritz@energytrust.org). Please clearly indicate “Request to Verify RFP Submission Receipt” in the subject line of the email submission.

All respondents will receive notification when a Consultant has been selected.

4.1 Signature Page
In order for Energy Trust to consider responses, respondents must submit the Signature page attached to this RFP as Appendix A (available below) as the cover page to its response. The Signature page must be signed by a duly authorized officer or agent of the respondent company submitting the response. The signature page does not count against the 20 page RFP response limit.

4.2 Proposal Contents and Format
Proposals should be formatted on an 8.5x11 page size and must not be more than 20 pages in length, providing information addressing each of the following categories:

Company Background, Overview and Relevant Experience

Describe the respondent’s background in providing web design, development and maintenance services, including company size and office location, the amount of time the respondent has been providing web design, development and maintenance services and any relevant experience in providing web design and development services to the environmental, energy and/or comparable non-profit industries and audiences. In addition, please describe experience or qualifications that support Energy Trust’s organizational goals to increase participation of underserved populations in energy efficiency and renewable energy programs, including:

- Any experience in designing or developing online experiences that are particular to low- and moderate-income customers, communities of color, or rural communities
- Efforts and experience in integrating diversity, equity, and inclusion internally in your firm, both in staffing and in contracting for services and note whether your agency is COBID-listed and/or whether your firm is woman or minority-owned
- Efforts and experience in teaming with minority and women-owned firms, for delivering services like those described in this RFP
Scope Approach

Describe your capabilities and process for providing the services listed in Section 3 (Scope of Work) above. Include description of the respondent’s general approach to providing web design and development services in situations where the majority of web content is managed through a client-side content management system. Include a description of any project management tools or methods used for tracking and sharing overall scope and budget progress with clients. Please also include creative samples relevant to the scope of services.

If the respondent is not COBID-listed and/or woman or minority-owned, the following is also required:

- Description of work in the scope that will be subcontracted to a COBID-listed and/or woman- or minority-owned firm(s), including what percentage of the total scope of work the subcontractor(s) will be responsible for. A minimum of 20% of the contract budget is required to be allocated to COBID-listed and/or woman-or-minority-owned firm(s) per Energy Trust's supplier diversity program.
- The name and primary contact information for the subcontractor(s) or, if the subcontractor(s) are not known by the due date of this proposal, a stated commitment to and plan to identify the subcontractor(s) during contracting and no later than the start of work on January 1, 2024

Team

Describe the experience of individuals that will comprise the respondent’s proposed team and any subcontractors, including names, titles, amount of time with the company and qualifications.

Cost Proposal

Respondent’s proposed pricing approach for the services as described in Section 3 either as time and materials with a not-to-exceed contract cap or alternative pricing. If proposed as time and materials, include respondent’s fee schedule for all proposed team members, including a typical blended rate if applicable. The budget and annual number of hours required under this contract vary depending on the flow of work, but will likely fall with a range of $250,000-$350,000 per year, or roughly 1,500-1,800 hours. This budget would include any hours dedicated to a respondent’s subcontractor.

Disclosures

Respondent will disclose any direct or indirect, actual or potential conflicts of interest with Energy Trust.

4.3 Interviews

Energy Trust may request that one or more respondents meet via video conferencing to discuss their proposal with the RFP selection team.

Energy Trust will not provide compensation for any costs related to presentations or demonstrations made in response to this RFP. Energy Trust will schedule any presentations at
mutually convenient times for Energy Trust and the respondents(s) within the defined period. Respondents should prepare for detailed questions about their company, team, relevant experience and proposed approach to the scope of services.

5. Consultant Selection Criteria
The RFP selection team will use the respondents’ written proposals and in-person interviews to evaluate responses. The criteria used in the team’s evaluation is below and some criteria will be given greater weight than others:

- Consultant approach to the scope of services in Section 3
- Reasonable cost/fees
- Relevant experience in environmental, utility, energy or comparable non-profit industries
- Relevant experience or firm qualifications in designing and developing web experiences for underserved populations
- Status as a COBID-listed and/or woman or minority-owned firm OR the proposed scope dedicated to a COBID-listed and/or woman or minority-owned subcontractor
- Experience developing and maintaining WordPress content management systems and PHP websites and tools
- Understanding the scope of work and detailed response
- Relevant experience of individuals, and individuals as a part of a team, assigned to this project
- Creative aesthetic
- Consultant’s office location*

*All responses are welcome regardless of geography and all responses that demonstrate qualifications outlined in the RFP will have a fair opportunity to compete. It is Energy Trust policy that if price, fitness, availability and quality are otherwise equal, Energy Trust will give preference to a bidder whose goods or services are produced, acquired, or available in the state of Oregon.

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

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.
Resulting Contract

Any final agreement on tasks to be performed as a result of this RFP 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 RFP would be through 2024. 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 RFP to any third party.

Ownership of Responses

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

No Verbal Addendums

Any clarification or interpretation of the RFP 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 RFP. Any addendum to this RFP will be in written form.

Respondent Costs

Each response prepared in response to this RFP 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 RFP.

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 RFP, 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 RFP at any time and/or issuing a new RFP 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 RFP process at any time.

Conflict of Interest

Respondent must disclose any direct or indirect, actual, or potential conflicts of interest respondent or its subcontractors may have with Energy Trust in its proposal. A “direct or indirect conflict” is defined as any situation in which an individual or a member of their family or close business or personal acquaintance, is employed by Energy Trust or the OPUC, 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 or actual 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. Respondent’s disclosure must specifically address any existing contracts between Energy Trust and the respondent, its staff, or any of its proposed subcontractors. If a potential conflict of interest is identified by the respondent, then the respondent should propose strategies to mitigate the conflict. If no conflict is identified by respondent, the respondent will explicitly provide such a statement in their RFP response. The determination of whether a conflict of interest exists is left to the sole discretion of Energy Trust. This information should be provided in an appendix to the proposal. No page limit

Additional Information

Energy Trust may request additional information.
Appendix A: RFP 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 RFP.
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: _________________________________________________________________________