

# **Energy Trust of Oregon**

## **Multifamily Renter Energy Conservation Workshop Content Request for Proposals**

**RFP Submission Deadline:  
September 29, 2023, 5:00 p.m. (PDT)**

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# I. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is seeking proposals through this Request for Proposals (RFP) for a consultant to design and develop workshop content consisting of materials/tools and instructor training supporting the delivery of energy workshops for multifamily renters. For the purposes of this RFP, “multifamily renters” means renters living in multifamily buildings that have four or more units. The purpose of this work is to create content that can be easily adjusted to accommodate various audiences from across the state, within Energy Trust’s service area.

This RFP is designed to allow Energy Trust to identify and contract with a qualified firm who has experience engaging with multifamily renters who are navigating low-income, has extensive knowledge of energy technologies and conservation opportunities, and has experience with design and development of workshop content/curriculum, and associated support materials.

This RFP does not include delivery of workshops; a separate solicitation is expected to follow to select instructors for delivery of workshop content. Application and/or selection through this RFP process does not preclude a consultant from also applying and being selected for the delivery of the workshops. This RFP also excludes translation of materials into languages other than English. Translation and interpretation for delivery of workshops will be handled outside of this scope.

The anticipated duration of the professional services contract associated with this RFP would be 6-12 months, with content development expected to occur over 4-5 months.

## 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 services, cash incentives and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save \$5.3 billion on utility bills. 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).

## About Multifamily Offerings

Energy Trust’s commercial Existing Buildings program provides electric and natural gas energy-efficiency solutions for multifamily properties, including free site evaluations, cash incentives for the installation of energy-efficient equipment and custom solutions ([Existing Multifamily Incentives](#)), as well as sponsoring resident workshops and kits for staying cool in the summer and warm in the winter months ([Multifamily Strategic Energy Management](#)).

To date, these workshops and accompanying kits have only been available in the Portland-metro area or to participants of our Strategic Energy Management offering. Current multifamily renter workshop customer engagement activities include:

- Workshop interest form for customers to fill out
- Scheduling support
- Workshop customization such as:
  - Tailoring to the building and/or property management requests
  - Offering interpretation
- Virtual/call-in or in-person workshops for multifamily renters
- Distribution of energy conservation supply kits to workshop attendees
- Energy conservation fact sheets (in multiple languages) ([Fact Sheets](#))

- Feedback forms and post-workshop surveys

In 2024, Energy Trust plans to expand renter summer and winter energy conservation workshops more broadly across its service area.

## RFP Scope of Work

Through this RFP, Energy Trust is seeking proposals to design two energy conservation workshops: summer and winter, and their accompanying content materials/resources, in a timely and collaborative manner. This work will include the selected consultant delivering training(s) on content to those instructors that Energy Trust selects to deliver the workshops. Energy Trust intends to conduct a subsequent solicitation process to select one or more contracted organizations that would deliver Energy Trust's developed workshop content to multifamily renters participating in its programs.

Energy Trust is looking for respondents to demonstrate an understanding of energy and other home conservation strategies for renters, experience and understanding of challenges and motivations of multifamily residents navigating low-income, educational/training experience and innovation that can be leveraged in the creation of these materials. Energy Trust is also looking for recommended strategies to help initiate and maintain long-term behavior change from our customers. Integration of other energy-related topics such as water savings, safety, health, and comfort benefits, is important for this content to have a holistic impact on the customer.

Energy Trust desires core content that can be customized to meet various customer needs. The final product must be consistent in messaging and style, meet Energy Trust brand guidelines, and shall be delivered to Energy Trust in a professional format ready for printing and/or distribution.

Energy Trust is looking for a list of supplies to include in kits provided to workshop attendees. The kit items should directly help the resident save energy or increase comfort as an indirect energy saving strategy. Items that do not meet these criteria may be included as optional items for consideration along with an explanation for how they support the overall objective. As a guide, Energy Trust would expect that kit supplies would not exceed \$45-65 per kit (excluding the cost of gift cards). The list should indicate whether the item is intended for the summer, winter or either workshop. Kit purchasing will need to be simple and items will need to be interchangeable and flexible to accommodate varying property and customer needs. Costs for each item and explanation of value/benefit are expected to be included for each kit item listed.

All materials, resources, and other deliverables, as well as the intellectual property related to those items developed under the resulting consulting agreement, will be owned by Energy Trust. Energy Trust expects that the consultant will work closely with Energy Trust and its contractors, if necessary, to ensure content allows for flexibility of delivery to meet community needs.

## II. Proposal

### Organize Your Proposal as Follows

Responses to this RFP must be submitted in the format described below and must describe the respondent's experience, approach, qualifications, and implementation abilities. **The overall page limit for the submitted proposal should not exceed 10 pages, excluding the Representation and Signature Cover Page and appendices.**

#### **PROPOSAL FORMAT (Sections should be identified by labeled tabs)**

Part 1. Proposal Summary (including signed Appendix A)

- A: Executive Summary
- B. Content development
- C. Instructor training

Part 2. Pricing

Part 3. Qualifications

- A: Project Team Qualifications and Experience
- B: References
- C: Project Delivery Schedule
- D: Project Management
- E: Business Information and Disclosure of Conflicts

### Part 1: Proposal Summary

Respondent's proposal must include a **Representations and Signature Cover Page (see Appendix A)** signed by an authorized representative of the respondent firm submitting the proposal. Viable proposals must address the project scope and schedule described in this RFP and clearly describe how respondent would design and develop multifamily renter workshop content for Energy Trust.

#### **A. Executive Summary**

Provide a summary at the beginning of your proposal that:

- Demonstrates respondent's understanding of the RFP's objectives and requirements
- Summarizes why respondent would be the best candidate to perform and complete the scope of work described in this RFP

#### **B. Content Development**

Energy Trust is looking for descriptive, illustrative content that will focus on energy conservation strategies that renters can do on their own in their home. It will need to be useable for an in-person application or online. In the proposal, please indicate the vision for the development and output of the following:



- Learning modules including the following descriptions for each module:
  - Summer and winter workshops and content, including expected outcomes of the workshops
  - Medium to be used with the materials including the platform and format
  - How the content will be modified/customized to meet varying customer/property needs. Some examples include, but are limited to:
    - Customers with air conditioning vs. no air conditioning
    - Customers who pay their utility bills vs. those that pay as part of their rent
    - Newer construction with modern technologies vs. older buildings
    - Property management rules for what can be installed/added/changed in a unit
    - Age and family needs and accessibility
  - How content will be culturally responsive
  - How use of kit items will be tied into the workshop
  - How respondent's delivered content is designed to be easily modified for remote and/or online learning.
- Workshop Facilitation Guide including a description of:
  - Guide components to support each learning module
  - How motivational strategies will be incorporated
- Strategies and/or materials to support resident services coordinators in their outreach to residents

The Facilitation Guide for instructors should outline considerations and discussion points throughout each module in order to reiterate important points that will lead to tangible and actionable outcomes for the workshop attendees. The guide should also be flexible and adaptable so that an instructor is able to tailor the content to meet specific site and/or customer needs. It should address the possibility that instructors may need to change course based on their progress and challenges they may encounter as they make their way through the training.

In addition to the required content materials, Energy Trust may explore utilizing the consultant to assist with the development of other supplementary materials to support renter/family engagement. One example is revisions to Energy Trust's coloring/activity book for children. Energy Trust would like the respondent to propose any additional supplementary renter conservation materials recommended by respondent.

In respondent's proposal, please indicate how respondent will solicit and apply feedback from instructors throughout their content development process and how respondent will prepare and integrate each piece to meet the intended objectives. This section should identify any relevant experience that the respondent has with the given component and whether respondent has existing materials that it is proposing to leverage to develop the Energy Trust materials.

## C. Facilitator Training

Energy Trust is looking for a summary of how respondent would approach training those selected by Energy Trust to deliver the workshops (instructors) across the state. Although the number is still to be determined, for the purpose of responding to this RFP respondent should expect that Energy Trust would have at least one instructor located in each of the five major regions of Oregon (Portland metro, mid-Willamette Valley, Southern, Central, Eastern) and represented in the training. Respondent should indicate how they will solicit and apply feedback from instructors during and after the training process.

## Part 2: Pricing

Energy Trust is envisioning time and material pricing up to a not-to exceed limit for the services; but may also consider alternative price structures such as project fixed fee basis, with payment amounts tied to successful delivery and acceptance of the major milestone deliverables. Complete the provided [Appendix B: Pricing Template](#) with the instructions provided in the instructions tab. Select either the time and materials option or fixed fee option.

Energy Trust has anticipated that the budget for the scope described in this RFP would be approximately \$35,000; however, we reserve the right to revise budget assumptions at any time. We ask that respondents propose as competitive a budget for the project as they can, while being realistic about the scope that they can complete within that budget.

## Part 3: Qualifications

### A. Project Team Qualifications and Experience:

Describe respondent team's experience in the following areas:

- With energy conservation strategies in the home, specifically behavioral that would apply to renters
- Understanding/knowledge of the multifamily market and building characteristics in Oregon
- Developing content/curriculum or educational materials, including teacher/instructor/facilitator support material.
- Engagement or experience working with multifamily residents/renters in Oregon navigating low income
- In integrating diversity, equity, and inclusion into their business operations, both internally and externally, and their experience conducting culturally responsive outreach and/or delivery of content/offerings/programs. 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.

Include an outline of the organizational relationships of respondent's team that would perform the scope (including any subcontractors), and a brief description of relevant experience, tenure and geographic locations of respondent's designated lead program manager and other key personnel responsible for delivering the work described in this RFP. If respondent's team includes subcontractors to perform the proposed work, describe the experience these parties have in designing and developing similar materials and specifically address the prime contractor's relationship with these subcontractors. Explain what makes the team capable of performing the proposed content design, development, and training and how the various functions will be coordinate to deliver the work products. Samples of related work products can be included as appendices.

Proposals should indicate if respondent's firm or subcontractors are certified with the Certification Office for Business Inclusion and Diversity (COBID) of Oregon as one or more of the following: Minority Business Enterprise, Women Business Enterprise, Emerging Small Business, or Service-Disabled Veteran Business Enterprise.

### B. References:

Identify any existing programs or materials developed and/or operated by respondent relevant to the scope addressed and include a minimum of three references, including name, title, address, telephone, and email, for parties knowledgeable about respondent's company generally and more specifically on the educational design experience of the key personnel.

### C. Project Delivery Schedule:

Provide a project delivery schedule that clearly demonstrates respondent's ability to effectively manage and carry out the project scope as described in this RFP. The schedule should anticipate that final workshop content must be complete by April 2024 in order to allow Energy Trust and its instructors enough time for outreach and delivery of the summer workshops. Clearly describe the actions respondent will take to complete each task, who will perform it, how it will be performed, when it will be performed, and its anticipated deliverables and/or outcomes.

Below are key **timeframes** to inform your proposed project delivery schedule:

- October, 2023: Consultant contracting to complete and content development work to begin
- October-November, 2023: Energy Trust expects to select and contract with its workshop instructors
- November, 2023-February, 2024: Consultant collects input/insights from Energy Trust and its selected instructors to inform content development
- Early March, 2024: Consultant conducts trainings for Energy Trust's selected workshop delivery instructors on the developed content
- March, 2024: Energy Trust and its instructors begin outreach to multifamily properties
- March-April, 2024: Consultant receives feedback from Energy Trust and its instructors and incorporates into finalized content
- May, 2024: Energy Trust begins delivery of finalized content to summer workshop participants

### D. Project Management:

Your proposal should address respondent's plan for the following project management aspects:

- Regular and detailed deliverable status updates with Energy Trust program staff.
- Staff management and deployment.
- Contract and, if applicable, subcontractor management.
- Designation of a single point of contact (Project Manager) for Energy Trust communication and coordination.
- Deadline tracking and proactive follow ups.

### E. Business Information and Disclosure of Conflicts

In one page or less, include the following information for the respondent entity that is proposing to perform the work described in this RFP as listed on the [Appendix A: Representations and Signature Cover Page](#) and, if applicable, each firm and organization in respondent's proposed team:

- Firm or organization legal business name and address
- D-U-N-S® Number from Dun & Bradstreet, if available
- Disclosure of Conflicts (see below)

**Disclosure of Conflicts:** Respondents must disclose any direct or indirect, actual or potential conflicts of interest respondent may have with Energy Trust. 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 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.



### III. Proposal Submittal Process

#### Schedule

Posting of Request for Proposals: **September 12, 2023**

Deadline to submit written questions or clarifications: **September 15, 5:00 PM**

Responses to questions or clarifications posted: **September 18, 5:00 PM**

Proposal Submission Deadline: **September 29, 5:00 PM**

Selection and notification to respondents: **October 9-11, 2023**

#### Questions

Any questions or clarifications regarding this RFP must be submitted via email and received by Energy Trust by 5:00 p.m. Pacific Daylight Savings Time, on the date listed in the Schedule above to: [tiffany.hatteberg@energytrust.org](mailto:tiffany.hatteberg@energytrust.org)

This email must include a subject line of "Request for Clarification- SEM Curriculum RFP". Requests for Clarification received via email prior to the stated deadline will be answered and posted on our [Contracting Opportunities](#) page under *RFP—Multifamily Renter Energy Conservation Workshop Content* by the date shown in the Schedule above.

#### Proposal Submittal/Method of Delivery

An electronic copy of the proposal is to be submitted to Energy Trust via email to [tiffany.hatteberg@energytrust.org](mailto:tiffany.hatteberg@energytrust.org). Energy Trust will accept proposals no later than 5:00 p.m. Pacific Time on **September 29, 2023**. Energy Trust will not be obligated to consider information received outside the requirements for the purposes of this RFP. The subject line of the email should read "*MF Renter Energy Conservation Workshop RFP response: Time sensitive*"

### IV. Proposal Evaluation Process & Criteria

The following **selection criteria**, and any other criteria which Energy Trust deems relevant, will be used to rank, and select proposals received. Ultimately, Energy Trust is looking for a proposal that balances high quality with a cost-effective product.

Scoring Criteria will weigh the following:

- Strength of Proposal
- Strength of the team
- Pricing

Energy Trust may request additional information from respondent prior to final selection. Energy Trust may invite the top ranked respondents to make a brief oral presentation and/or to participate in interviews, either in person or remotely. After review of proposals and any interviews, Energy Trust will select a firm to provide the services described herein.

### V. RFP Governing Provisions

All submitted proposals are subject to the following:

#### A. 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.

## **B. 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. 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 new RFP that would supersede and replace 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.
- Suspend or modify the RFP process at any time.
- Enter into relationships with more than one respondent.

## **C. 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.

## **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 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.

## **F. 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 award will be considered a commitment, and no obligations or legal relations shall exist between Energy Trust and any selected respondent

until a final and binding written contract has been executed by and between Energy Trust and such selected respondent. Time is of the essence, 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.



## List of Appendices

[Appendix A: Representations and Signatures Cover Page](#)

[Appendix B: Pricing Template](#)