

Energy Trust of Oregon

Multifamily Renter Energy Conservation Workshop Delivery Request for Qualifications

Request for Qualifications (RFQ) released: Friday, November 3, 2023

Questions/requests for clarifications due: Friday, November 10, 2023

Answers to questions/clarifications posted: Thursday, November 16, 2023

RFQ Responses due: Thursday, November 30, 2023

Selections to be made by December 8, 2023

A. RFQ Goal

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c)(3) corporation, is seeking qualifications from community-based organizations with the desire and ability to provide 1-hour **summer and winter energy conservation workshops to residents in multifamily rental properties located in their Oregon communities**, as described in this Request for Qualifications (RFQ).

Through this RFQ, Energy Trust seeks to connect with a pool of community-based organizations located across Oregon, such as non-profits, tribal entities, and local government providers, that are pre-screened and qualified to deliver the renter workshop services described in this RFQ.

Organizations selected for the pool with this RFQ are prequalified for contracting with Energy Trust and will be engaged, as needed, for the services, but no contract is implied or guaranteed by this RFQ or by selection into the pool. Total aggregate annual budget for all services covered by this RFQ and the resulting pool of service providers is not expected to exceed \$300,000.

B. RFQ Scope

Energy Trust is looking for one or multiple organizations to provide energy education to renters in multifamily buildings. The renters can be located in multifamily buildings located anywhere in Oregon if the building is an electric customer of Portland General Electric or Pacific Power and/or a natural gas customer of Northwest Natural, Cascade Natural Gas, or Avista. See Energy Trust's [territory map](#) for more detail. Energy Trust expects the organizations delivering multifamily renter workshops to perform the following tasks.

- Review and attend a (one-time) training on Energy Trust-provided workshop content including:
 - Energy and water saving tips that can help improve comfort and safety
 - Energy Trust and utility incentives and services available for renters
 - Activities for youth
- Deliver the 1-hour workshop energy conservation content and facilitate discussion with attendees, including offering interpretation services as appropriate (ongoing)
- Workshop preparation and follow-up:

- Work with other Energy Trust representatives to coordinate outreach to multifamily properties and/or process intake referrals (ex. customer-initiated workshop interest form). Priority will be on frontline communities and the following multifamily building types:
 - Affordable multifamily housing
 - Nonprofit-managed multifamily housing
 - Senior housing
 - Agricultural workforce housing
 - Properties older than 15 years
- Provide ideas for customizing workshop content as may be needed to accommodate building, property management and/or renter needs, and make changes to content for the specific audience
- Make all needed arrangements to schedule the delivery of virtual/call-in or in-person workshops to attendees
- Purchase and/or deliver kits that contain conservation-focused supplies to workshop attendees
- Assist with collecting workshop attendance information and kit feedback

The anticipated timeline for completing key tasks would be:

- Content training completion by April 2024
- Available to deliver summer workshops: May through August 2024
- Available to deliver winter workshops: October 2024 through January 2025

C. About Energy Trust’s Multifamily Program Offerings

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

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.

In addition, multifamily property owners can also take advantage of Energy Trust’s Strategic Energy Management offering, which provides energy coaching services to help participants find ways to conserve energy and lower cooling/heating costs in their buildings. This offering has included Energy Trust providing funding for building resident workshops and giveaway kits provided to workshop attendees to use in their homes to help them stay cool in the summer and warm in the winter months.

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. Beginning in 2024, Energy Trust plans to expand renter summer and winter energy conservation workshops more broadly across its service area. By working with other organizations across our service area who are located in and providing services directly to their communities, we are excited to leverage established local relationships and make new connections to help renters in multifamily properties

reduce energy costs and increase the comfort of their residences.

D. RFQ Response Requirements and Process

To be considered complete, RFQ respondents must submit a response as described below. Responses must be emailed to Kathleen.belkhat@energytrust.org not later than Thursday, November 30, 2023, at 5:00 p.m. (PST). Please use the following in the subject line of this email: "MF Renter Energy Workshop Delivery RFQ RESPONSE". Please provide responses to this RFQ as follows:

1. Please fill out the following attached **Appendix A: RFQ Questions**.
2. Please provide **short biographies or resumes** (including relevant licenses, certifications and training) of key staff that would be assigned to the specific scope of work tasks outlined in this RFQ above (see Section B "RFQ Scope"). (Maximum of 3 pages)
3. Disclose rates associated with the services you provide. Specifically include hourly costs, or other pricing, for services described in this RFQ. Energy Trust is interested in time and material pricing for key staff members as well as other proposed pricing structures to deliver the scope (ex. fixed fee per workshop).

Selected respondents will be notified of their acceptance to the pool via email, and interviews may be scheduled in some cases.

E. Questions

Respondents must submit any questions or clarifications regarding this RFQ via email, and the questions must be emailed to Kathleen.belkhat@energytrust.org no later than Friday, November 10, 2023, at 5:00 p.m. (PST). Please use the following in the subject line of the email: "MF Renter Energy Workshop Delivery RFQ QUESTION". Energy Trust will gather, anonymize, and respond to all questions or requests for clarification received before the deadline, and post the questions and answers and to Energy Trust's page under the RFQ by Thursday, November 16, 2023.

F. 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.

Conflict of Interest Disclosure

Respondent shall 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.

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 or revise 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. 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 add to, detract from, affect or modify the terms of the RFQ, unless specifically included in a written addendum issued by Energy Trust.

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 proprietary portions of their responses that they do not want revealed to third parties and label such portions as "Confidential Information." Except as required under Energy Trust policy, law or for regulatory purposes, Energy Trust will maintain confidentiality of such information.

Respondent Expenses

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.

Selection Criteria

Pool selection will be the sole responsibility of Energy Trust and will be undertaken at the sole discretion of Energy Trust. Entries may be eliminated from consideration at Energy Trust's sole discretion for any reason, but at a minimum, including but not limited to:

- The qualifications, strengths or experiences do not align with the objectives and requirements of this RFQ.
- The qualifications are inconsistent with Energy Trust policies or requirements.
- A conflict of interest exists.
- Reasonable cost.
- Experience and approach to projects and services with focus on diversity, equity and inclusion.

Waiver of Claims

Respondent waives any right it may 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.

Appendix A: RFQ questions

#	Question/Direction	Answer/Comment
1	Provide a brief description of your community-based organization, mission and vision, including any qualifications and credentials that are relevant to the scope described in this RFQ (see Section B “RFQ Scope”) including the energy and energy efficiency industry.	
2	Describe your experience engaging with renters around the topic of energy use.	
3	What is your experience purchasing items in bulk and delivering to eligible recipients? For example, activity kits, school supplies, etc.	
4a	What regions of Oregon are your staff located and which location/communities are you interested in delivering workshops? Check all that apply.	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Portland Metro <input type="checkbox"/> Mid-Willamette Valley <input type="checkbox"/> Central <input type="checkbox"/> Eastern (NE) <input type="checkbox"/> Southern <input type="checkbox"/> North Coast <input type="checkbox"/> Other </div> <div style="width: 45%;"> <input type="checkbox"/> A specific community in the Portland metro area <input type="checkbox"/> A specific community in the Mid-Willamette Valley area <input type="checkbox"/> A specific community in Central Oregon <input type="checkbox"/> A specific community in Eastern Oregon <input type="checkbox"/> A specific community in Southern Oregon <input type="checkbox"/> A specific community in North Coast of Oregon </div> </div> <p>Location of staff:</p>
4b	If you marked interest in a specific community above, use this area to tell us more about the specific community or communities including your relationship to/experience working with that community.	

#	Question/Direction	Answer/Comment
5	Provide a brief description of your organization's strategies and approaches to reaching a diversity of communities and customers.	
6	Provide a brief description of your organization's strategies and approaches to culturally responsive engagement and communication.	
7	Describe your organization's experience working with multifamily renters navigating low income.	
8	Describe your organization's experience working with youth and/or seniors.	
9	Describe your organization's experience delivering a workshop/training in-person and virtually	
10	Describe your organization's experience interpreting/translating information or engaging and working with others that do interpretation/translation.	
11	What other information about your organization and/or qualifications of your team do you wish to share in relation to this scope?	