

Energy Trust of Oregon Request for Qualifications (RFQ): Irrigation Modernization Program

RFQ Issued: November 15, 2023

Intent to Bid and Questions Due: November 22, 2023

Proposals Due: December 6, 2023

Respond to:

Kyle Petrocine
421 SW Oak St., Suite 300
Portland, OR 97204

Kyle.petrocine@energytrust.org / 503.445.0600 ext 140

About Energy Trust

Energy Trust of Oregon is an independent nonprofit organization dedicated to delivering energy efficiency and renewable power benefits to two million utility customers. We are funded by and serve Oregon customers of Portland General Electric, Pacific Power, Cascade Natural Gas and Avista, and Oregon and Washington customers of NW Natural. A non-stakeholder board of directors guides our work with input from three advisory councils, and we are overseen by the Oregon Public Utility Commission. Since 2002, our technical services, cash incentives and energy solutions have helped participating customers save \$5.3 billion on their utility bills. The cumulative impact of our leadership has been a contributing factor in keeping our state's energy costs as low as possible, adding renewable power to the grid from small and medium-scale projects, and building a sustainable energy future. 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.

Some of Energy Trust's requirements in this RFQ (Request for Qualifications) and in any subsequent negotiating and/or contracting phases are driven by governing law, the provisions of our grant agreement with the OPUC (the OPUC Grant Agreement) and our funding agreements with each utility.

Introduction and Scope of Services Sought

Energy Trust is seeking proposals for Irrigation Modernization Program Support.

RFQ Background

In 2014, Energy Trust released an RFQ seeking a contractor to develop and manage a new initiative aimed at reducing pumping loads and installing new in-conduit hydropower projects through the modernization of agricultural water delivery infrastructure (i.e., irrigation districts) in Oregon. The resulting Irrigation Modernization Program helps irrigation districts and the farmers they serve to partner with appropriate agency and community stakeholder groups to identify the values and goals they want to achieve in the future, quantify potential modernization benefits, and develop strategies for funding and implementation.

Oregon's 6,500 farms typically receive water through open-air canals owned by irrigation districts. The canals transport more than 480 billion gallons of water annually, but these aging, open systems are deteriorating; many are over 100 years old and are inherently inefficient. Historically, farmers and ranchers have upgraded their infrastructure on a piecemeal, project-by-project basis. This approach works at a small scale, but takes a long time, does not effectively scale up, and delays the benefits that can be achieved through modernization.

One example of modernizing an irrigation system starts by replacing open canals with pipes, conserving water previously lost to seepage and evaporation. Gravity pressurizes water delivered through pipes, allowing irrigators to eliminate or reduce pumping, saving

energy and related costs. Surplus water pressure in a piped delivery system can be used to produce in-conduit hydropower.

In addition to these energy benefits, removing canals and their associated water losses enables more water to be both left in rivers and more efficiently delivered to farms, improving drought resilience and reducing pollutant runoff. River water temperatures can be improved, and, through better technology, stream reaches can be restored by the elimination of irrigation diversion dams. Providing pressurized water to farmers enables on-farm irrigation upgrades saving additional water, encouraging reinvestment and the production of higher-value crops. When fires strike, pressurized water lines can be tapped by wildland firefighters.

Through the Energy Trust funded efforts of the contractor selected to perform the work outlined in the 2014 RFQ and subsequent 2019 RFQ, Oregon irrigation districts have secured an unprecedented \$245 million for infrastructure project assessment/design and implementation over the past nine years. Twenty-eight irrigation districts have entered into irrigation modernization participation program agreements with Energy Trust.

The United States Department of Agriculture-Natural Resources Conservation Service's Watershed Protection and Flood Prevention program (P.L. 83-566) is a significant funding resource for irrigation modernization piping and construction. To invest this federal funding and realize the associated benefits, Oregon irrigation districts need to develop and secure 25% non-federal match. Energy Trust's initial investments and subsequent P.L. 83-566 funding have created an unprecedented opportunity to modernize irrigation infrastructure, facilitating energy efficiency savings and new renewable energy projects. As a result, sustained coordination, communication, and partner development is required to ensure long-term, large-scale funding for irrigation modernization and successful project implementation.

In 2022, Energy Trust contracted with Apex Analytics to review the impact of the Irrigation Modernization Program (IMP) to understand the program's outcomes and potential for market transformation. Apex's research concluded that the IMP functions as a market transformation program, and its potential to expand available funding and support for irrigation modernization is central to its market transformation objectives. Further, Apex concluded that the IMP helps irrigation districts overcome barriers to modernization improvements in three critical ways:

- By providing technical support and analysis to prioritize and scope modernization improvements.
- By providing communications support to the internal and external audiences impacted by modernization projects; and
- By facilitating access to external funding sources to pay for modernization improvements.

The activities described in the **Scope of Work** sustains Energy Trust's support for the IMP and positions Oregon irrigation districts to secure available large-scale state and federal investments and Energy Trust's desired energy generation and energy efficiency outcomes. Energy Trust continues to believe the co-benefits associated with modernization, such as water conservation and economic development, will be critical to developing partner support at scale.

This RFQ seeks the qualifications of consultants who can help Energy Trust implement this collaborative program by providing the services described in the **Scope of Work** section below. It is anticipated that a selected respondent will enter into a written agreement with Energy Trust for an initial term of one year, with one potential one-year extension for a possible total maximum term length of two years. Any written agreement would contain terms and conditions with respect to, among other things, confidentiality, indemnity, insurance, and intellectual property rights. An annual budget of up to \$200,000 has been dedicated to this effort, with a total not to exceed \$400,000 over a maximum two-year contract term.

RFQ Schedule

Statements of qualifications submitted in accordance with the **Submission Requirements** as outlined below will be accepted until 5:00pm Pacific Standard Time on December 6, 2023. Respondent submissions will be reviewed, and respondents will be notified whether they have been selected as a finalist to proceed in the review process not later than December 13, 2023. Energy Trust may conduct interviews or seek additional information before making a final selection. Final selection of the successful respondent will be announced to the selected respondent not later than December 20, 2023.

Any questions may be directed to Kyle Petrocine, Senior Project Manager, at kyle.petrocine@energytrust.org or 503.445.0600 ext. 140.

Scope of Work

Energy Trust is interested in maintaining support for the Irrigation Modernization Program to catalyze new renewable energy generation and energy efficiency opportunities. These opportunities would not be possible without a contractor managing the Irrigation Modernization Program.

The selected respondent will strengthen and expand the network of stakeholders in support of the modernization of irrigation districts in Oregon. The program's terminal goal is to facilitate the development and implementation of renewable energy generation and energy efficiency projects. The selected respondent's work will support these stakeholders' separate and shared objectives related to irrigation modernization, including renewable energy generation, energy efficiency, water conservation, public safety, increased agricultural production, decreased agricultural production costs, investments in rural communities, ecological enhancement, and fish passage improvement. These co-benefits secure stakeholder and community support while

achieving important, non-energy state policy goals. The selected respondent will support Oregon irrigation districts (i.e., general managers, boards, staff) through implementation of modern irrigation systems, build and manage strong partnerships with institutional investors, and communicate the potential for and benefits of irrigation modernization to achieve these objectives (the Irrigation Modernization Program or “Program”).

Task 1. Support irrigation districts as they move from technical assessments, planning, and System Improvement Plans through modernization (piping) project funding and implementation and help districts identify and leverage new sources of funding from federal (e.g., Inflation Reduction Act, Bi-partisan Infrastructure Law) and state (e.g., Oregon Clean Water State Revolving Fund) sources.

Task 2. Conduct outreach to state, tribal, private, and philanthropic investors and funders to develop long-term project implementation funding programs, with a focus on developing the required non-federal funding needed to match federal funds available through P.L. 83-566.

Task 3. Recognizing the values that co-benefits the Irrigation Modernization Program provides, which support the policy goals of state agencies and other non-governmental entities, diversify funding by developing additional long-term funding sources to support management of the Irrigation Modernization Program through outreach to federal, tribal, state, private, and philanthropic investors, and funders.

Task 4. Conduct outreach and coordination to state and federal agency staff and elected officials to provide education into the benefits of irrigation modernization, and the opportunities and barriers associated with accelerating project implementation. Conduct strategic engagement to maintain alignment, raise awareness, and forestall confusion among the public, conservation organizations, and elected officials.

Task 5. Facilitate strategic communication with stakeholders highlighting people, projects, and economic and local benefits of modernization and support for targeted communications efforts around modernization milestones (e.g., hydropower commercial operations, piping completion, ground breakings, etc.).

Task 6. For irrigation districts moving from planning into implementation, coordinate closely with Energy Trust Marketing and Communications on public education opportunities and to raise awareness of major modernization program and project milestones and achievements; integrate Energy Trust leadership where appropriate into public events; and collaborate on media materials and opportunities for stakeholder and customer engagement and interaction.

The following deliverables will be completed by the contractor over the term of the agreement:

1. Quarterly Reports: Written updates delivered to Energy Trust by email each quarter through the term of the Agreement detailing the progress of irrigation districts participating or likely to participate in the modernization program, including, but not limited to:
 - Milestones: progress on major modernization milestones and activities by district;
 - Funding: planned or submitted infrastructure modernization funding applications and any awarded funding;
 - Energy
 - Hydropower: next steps necessary to develop identified hydropower projects, including documentation of the irrigation district General Manager's hydropower development intentions, timeline, pathway, and progress to hydropower construction. We envision an implementation plan / Gantt chart type display of what pieces of the overall modernization plan are to be constructed and when, how hydropower is integrated and when, etc. as determined by the district;
 - Other irrigation district development plans with an energy nexus, such as solar, battery energy storage, piping yielding energy efficiency from pump removal, etc.
 - Spending forecast: forecasted project spending as compared to budget and overall spending rate for participating projects.
2. Annual Report: at the end of each calendar year through the term of the Agreement, deliver a year-end summary detailing progress towards the tasks and objectives listed in the sections above, outreach, stakeholder engagement, funding coordination, etc. and highlighting major accomplishments or outcomes from the Irrigation Modernization Program in that calendar year, delivered to Energy Trust by email with the final monthly invoice.
3. Organize and host one or more irrigation modernization groundbreaking/celebratory event(s) with Energy Trust over the agreement term. Support the production of outreach videos and/or earned media that promote the Program.
4. Completion of an annual Irrigation Modernization Program update presentation to the Energy Trust Board of Directors.
5. Other updates and information as Energy Trust and Contractor agree provide information needed for the efficient and effective administration of the modernization program, delivered in reasonable time limits as appropriate to the information provided.

Schedule Assumptions

Energy Trust anticipates contracting for the services sought starting April 1, 2024. Services would be expected to be concluded not later than March 31, 2026.

Budget Assumptions

The budget for the scope described in this RFQ will be approximately \$200,000; however, Energy Trust reserves the right to revise its budget assumptions at any time.

Qualification Description Requirements

Qualification descriptions must be clear, complete, and concise. Pages must be numbered, sections must be clearly titled, and fonts must not be smaller than 11 point. Respondent's proposal must contain each of the elements listed below. Failure to include any required elements may result in the rejection of respondent's proposal. Please note the **18-page limit**. This page limit does not include the supplemental information requested—the work product example, resumés, insurance coverage information, conflict of interest disclosure, and representations page. These items should be included in attached appendices.

1. Proposal Content

Qualifications and Approach for Scope of Work:

Proposals should provide an overview of the lead firm and any subcontractors. We encourage respondents to create a team of firms with specialized expertise to fill different project roles. Potential subcontractor roles include but are not limited to marketing, communication, outreach and other consulting services. Proposals should describe thinking and strategy on how the team will approach and conduct the Scope of Work. **Not to exceed 8 pages.**

Staffing and subcontracting plan:

Describe the project team structure, role of each key team member, subcontractor roles, COBID or other eligible certification numbers for certified subcontractors (see *Supplier diversity requirements section below*) and the management plan. **Not to exceed 3 pages.**

Supplier diversity requirements:

Proposals should indicate if respondent's firm or subcontractors are certified with the Certification Office for Business Inclusion and Diversity (COBID) of Oregon or any eligible federal certifications as one or more of the following: COBID-Minority Business Enterprise, Women Business Enterprise, or Service-Disabled Veteran Business Enterprise; Federal certifications-Small Disadvantaged Business (SDB), Women Owned Small Business (WOSB), Economically Disadvantaged Women Owned Small Business (EDWOSB), 8(a) Business Development Program, Veteran Owned Small Business (VOSB), Service Disabled Veteran Owned Small Business (SDVOSB), Historically Underutilized Business Zone certification (HUBZone).

Proposals that contain a plan for expending a minimum of 20% of the value of any resulting contract being directed towards COBID or other eligible certified firms (a Supplier Diversity Plan) will be weighted beneficially in the selection process. If such a plan is presented, it should be reflected in the staffing plan, a subcontracting plan, if applicable and budget proposal. Please describe this Supplier Diversity Plan, if any. **Not to exceed 1 page.**

Budget:

Provide a detailed budget proposal, based on the proposed methods and staffing plan. Should be bid as a time-and-materials, “not-to-exceed” budget cap type contract. Proposals should describe the underlying budget assumptions and any drivers of cost that can be modified without compromising the integrity of the evaluation.

Please use the budget template provided below. Key staff and subcontractors should be identified by name, with billing rates for each. **Not to exceed 2 pages.**

Budget template:

Staff Name	Firm	Hourly Rate	Hours Per Task			Total Hours	Total Cost
			Task 1	Task 2	Task...		
Staff Member 1							
Staff Member 2							
Staff Member...							
Subcontractor 1							
Subcontractor...							
Total Hours Per Task							
Direct Costs							
Total Cost Per Task							

Diversity, equity, and inclusion experience:

Proposals should describe respondent’s efforts and experiences in integrating diversity, equity, and inclusion into their business operations, both internally and externally. 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. Respondents must provide responses to each of the questions in **Appendix B**. **Not to exceed 3 pages.**

Data security and confidentiality:

Proposals should provide a brief description of respondent’s approach to data security and confidentiality. Please describe how respondent will ensure that customer information and data collected throughout the evaluation are kept secure and confidential during fielding, data transfers, storage, and analysis. **Not to exceed 1 page.**

2. Work Product Example

Proposals should include **one past report** that showcases the respondent team's work on a similar project, as well as their analysis, data presentation, and reporting capabilities. If needed, the names of people and organizations may be redacted from the report to allow sharing it. The work product example should be included as an appendix to the proposal. **No page limit, but please keep materials to a minimum.**

3. Resumés

Proposals should include resumés of all key team members, from the lead firm and any subcontractors who will be performing work. These should be included in an appendix to the proposal. **No page limit.**

4. Insurance Coverage Information

Energy Trust requires its contractors to maintain, at a minimum, workers compensation insurance, adequate commercial general liability insurance coverage, and automobile liability insurance. Cyber liability coverage may also be required. Provide a description of the insurance coverage provided by respondent for performing the impact evaluation work, including:

- Whether such coverage is on a “comprehensive” or “commercial” form
- Whether such coverage is on a “claims made” or “occurrence” basis
- All endorsements excluding coverage of any nature, if any
- All limits, including aggregate limits and the current remaining coverage amounts under those limits
- Effective date

This information should be provided in an appendix to the proposal. **No page limit.**

5. Conflict of Interest Disclosure

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 RFQ 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.**

6. Representations and Signatures Page

Respondent's proposal must contain the signature of a duly authorized officer or agent of the respondent company submitting the proposal. Respondent's duly authorized officer or agent shall sign **Appendix A** certifying to the representations stated on **Appendix A**. The signed page should be provided as an appendix to the proposal.

Proposal Selection Criteria

Proposals will be judged on the criteria listed below. As noted above, failure to meet the proposal requirements may result in the rejection of a proposal without scoring.

- Proposal Scope of Work Approach
- Staffing plan and qualifications of proposed team
- Proposed budget
- Work product example
- Diversity, equity, and inclusion responses
- Data security and confidentiality

RFQ Schedule & Administration

RFQ Schedule

- **November 15, 2023** RFQ issued
- **November 22, 2023** **Intent to bid due**
- **November 22, 2023** Questions/request for additional information due
- **November 29, 2023** Clarifications/question responses posted to website
- **December 6, 2023** **Proposals due**

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFQ, as well as stating intent to bid on the project, must be submitted via email to the contact named below by November 22, 2023. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than November 29, 2023. Energy Trust cannot accommodate individual phone, mail, or fax inquiries about the RFQ. All questions must be submitted via email.

Stating intent to bid does not obligate a respondent to submit a proposal. Only electronically submitted proposals (in PDF form) will be accepted; faxed or print proposals will not. A signed letter of transmittal (cover letter) is required and should be scanned and submitted along with the proposal. All proposals must be received by 5 PM Pacific Time on December 6, 2023. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFQ.

Please submit proposal to:

Kyle Petrocine
Energy Trust of Oregon
Email: kyle.petrocine@energytrust.org

Revisions to RFQ

If it becomes necessary to revise any part of this RFQ, an addendum will be issued by Energy Trust and will be posted on the website. Respondent should contact Energy Trust if they find any inconsistencies or ambiguities to the RFQ. Clarification given by Energy Trust may become an addendum to the RFQ.

Withdrawal and Modification of Proposals

Respondents may withdraw their proposal and submit a revised proposal prior to the response deadline. After the response deadline, respondent-initiated changes will not be accepted. Respondents may withdraw their proposal from consideration at any time.

Proposal Evaluation and Notification for Negotiations

Energy Trust will review the proposals as received and may initiate negotiations with the leading respondent(s).

RFQ Governing Provisions

All submitted proposals are subject to the following additional provisions.

Right to Accept or Reject Proposals, Multiple Awards

Energy Trust reserves the right to make multiple awards, reject any and all proposals and to waive any nonconformity in proposals received, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed in Energy Trust's best interest. Energy Trust may also choose to negotiate any of the details of proposals prior to contracting.

Confidentiality

Respondents shall clearly identify only those portions of their proposals 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. Energy Trust will not accept proposals or other documents that are marked to indicate the entire document is the confidential or proprietary information of the sender or that restricted handling is required. Normal business practices will be observed in handling proposal materials.

Ownership and Return of Proposals

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

No Verbal Addendums

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.

Proposal Costs

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

Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust or its officers, directors, employees, or agents, 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 proposals 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:

- Determine which proposals are eligible for consideration for this RFQ.
- Disqualify proposals that do not meet the requirements of this RFQ, in the sole determination of Energy Trust.
- Negotiate with any respondent to amend any proposal.
- Select and negotiate and/or enter into agreements with respondent(s) who, in Energy Trust's sole judgment, are most responsive to the RFQ and whose proposals best satisfy the interests of Energy Trust, in its sole discretion, and not necessarily on the basis of price alone or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFQ at any time and/or issuing a new RFQ 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 RFQ process on any terms and conditions.
- Suspend or modify the RFQ process at any time.
- Enter into relationships with more than one respondent.

Resulting Contract(s)

The selected respondent will be required to execute a written contract(s) with Energy Trust to perform the evaluation work. 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 contract has been executed by and between Energy Trust and the contractor. Time is of the essence with regard to this program evaluation work, 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.

The selected respondent will be required to sign Energy Trust's Utility Customer Information (UCI) confidentiality agreements to gain access to customers' energy consumption data. There is a contractor version of the UCI confidentiality agreement, which can be found here, for reference:

https://energytrust.org/wp-content/uploads/2021/10/LGL_FM0205C.pdf.

There is also an individual version of the UCI confidentiality agreement, which can be found here, for reference:

https://energytrust.org/wp-content/uploads/2021/10/LGL_FM0205I.pdf.

Appendix A: Representations and Signature page

I, the undersigned declare that;

1. I am an authorized agent of the respondent and have authority to submit this proposal on behalf of the respondent.
2. The information provided in this proposal is true and correct to the best of my knowledge.
3. I have read this Request for QualificationsP in its entirety and agree unconditionally to all of its conditions and requirements.
4. The respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham proposal.
5. The respondent has not solicited or induced any other person, firm, or corporation to refrain from proposing.
6. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. The respondent's proposal 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 understand and accept that the approval or rejection of respondent's request is within the sole discretion of Energy Trust and that there is no legal commitment until all due diligence has been performed and a properly authorized contract has been duly and properly executed.
9. I authorize the representatives of Energy Trust to investigate the business financial credit history of respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
10. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while I am under consideration for funding.

The information contained in this proposal and any part thereof, including its exhibits, schedules, and other documents and instruments delivered or to be delivered to Energy Trust is true, accurate, and complete. This proposal includes all information necessary to ensure that the statements therein do not in whole or in part mislead Energy Trust as to any material fact.

Date: _____

Authorized Signature: _____

Name and Title: _____
(please print)

Appendix B: Diversity, Equity and Inclusion Experience

DEI hiring practices and policies

1. Is respondent's firm required to submit equal opportunity employment (EEO) reports? (For companies of 100 staff members or more, the Equal Employment Opportunity Commission requires regular filings of form EEO-1.)
 - a. If so, provide a copy of respondent's most recent EEO-1 report.
 - b. If not, please provide a summary of staff from respondent's firm who would be performing work on this project, using a table format and employment data categories aligning with EEO-1 reporting – see [this sample form](#), specifically, the table in section D.
2. Provide specific examples of activities, projects, or plans developed by respondent that demonstrate how respondent promoted DEI within respondent's company in the areas of (1) recruitment, hiring, retention and promotion, (2) training and professional development, and (3) respondent's company strategy.

DEI planning, evaluation, and research experience

3. Provide specific examples of how respondent has ensured cultural competence¹ in research or work similar in nature to the work described in this RFQ.

¹ The American Evaluation Association's [Public Statement on Cultural Competence in Evaluation](#) provides a detailed explanation of cultural competence in evaluation.