Introduction

About Energy Trust

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c)(3) corporation, is seeking qualifications from businesses capable of creative services agency. The selected agency will work with Energy Trust Lighting program to support a variety of creative services needs described below in this RFQ.

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 invest in and benefit from energy efficiency and renewable energy. Energy Trust’s work helps keep energy costs as low as possible, creates jobs and builds a sustainable energy future.

For more information about Energy Trust and our programs, visit www.energytrust.org/about.

Background

Oregon lawmakers passed House Bill 2531 in June 2023 with the goal of reducing environmental impacts of mercury used in fluorescent lighting. The law prohibits the sale or distribution of screw-in or bayonet-style compact fluorescent lightbulbs starting January 1, 2024, followed by pin-type compact fluorescent bulbs and linear fluorescent lighting starting January 1, 2025.

Energy Trust provides incentives to commercial and industrial customers who upgrade older lighting equipment with efficient new solutions. This typically means replacing fluorescent lighting with LEDs.

As LEDs become the standard, business lighting incentives will gradually adjust to transition to lighting solutions like efficient exterior lighting, process lighting, controls and other innovative, whole-building solutions.

Energy Trust will continue supporting customers and trade ally contractors throughout the transition to align with the new law. Most standard lighting incentives will remain in place through December 31, 2024. Incentives for replacing screw-in compact fluorescent lights (CFLs) will still be available in the first half of 2024, ending on July 1, 2024.

Incentives for replacing linear fluorescent lighting and pin-style CFLs will be available through mid-2025, ending on July 1, 2025.
Energy Trust is seeking services through this RFQ, to advance program delivery through the transition of its lighting program. Energy Trust seeks a creative agency to provide creative services for print and digital ads, email marketing, Google Search and display ads, and written customer story testimonials for our Business Lighting program.

The overarching goal is to drive small and rural businesses to our direct install lighting page on our Run Better website so business customers will sign up to participate in Energy Trust's direct install lighting offer.

Messaging should position this as a free limited time offer. Business customers should act now because the offer will not be available after July 1, 2025.

RFQ Key Dates
RFQ responses must be submitted electronically, in PDF format, by February 14, 2024, at 5:00 p.m. (PDT). A maximum length of five (5) pages will be accepted, not including the Representations and Signature Page (Appendix A) or work samples.

<table>
<thead>
<tr>
<th>Request for Qualifications released</th>
<th>Wednesday, January 31, 2024</th>
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<tbody>
<tr>
<td>Responses due</td>
<td>Wednesday, February 14, 2024, by 5:00pm.</td>
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<tr>
<td>Selections expected to be announced</td>
<td>February 21, 2024.</td>
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Please send any questions to ashley.bartels@energytrust.org. We will accept and respond to questions between January 31, 2024 until February 14, 2024.

Budget and Contracting for Services Sought by RFQ
Energy Trust has estimated a budget not to exceed $60,000 for the services outlined in the scope of services section. The resulting contract will be for one year with a possible one-year extension pending program changes. If the contract is extended, we would negotiate the budget. It is expected that the agency selected will enter into a professional services contract with Energy Trust that contains a scope of work with terms and conditions.

RFQ Scope of Services
The selected contractor will develop the following creative assets to use in marketing and advertising.

<table>
<thead>
<tr>
<th>Task</th>
<th>Service</th>
<th>Details</th>
<th>Est. date of completion</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Creative Ads</td>
<td>Develop creative assets for advertising:</td>
<td>March 22, 2024</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Print (1 design and resized according to media buy. Media buy is still being determined but typically 20 resized)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>- Digital (2 designs in 7 sizes)</td>
<td></td>
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<td></td>
<td></td>
<td>- Social media (1 design in FB, IG and LI ad sizes)</td>
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Another firm will place and pay for the ads. This is only creative services.

<table>
<thead>
<tr>
<th></th>
<th>Service Description</th>
<th>Deadline</th>
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<tr>
<td>2</td>
<td>Develop creative assets (1 ad) and a list of key search terms (10-20 terms) to purchase Google display ads. Includes purchasing the ads, managing and optimizing ads from go live date until March 1, 2025.</td>
<td>March 22, 2024</td>
</tr>
</tbody>
</table>
| 3 | Develop written testimonials (2) for use on Energy Trust’s blog to display how other customers have participated in our direct install lighting offer and the benefits it has brought to their business. Energy Trust will provide the customer name, details on project, and customer contact information. Vendor will interview customer, provide a written story and photography images of the customers space. Testimonials are typically 600-800 words and include 4-8 images. | Story 1 – April 19, 2024  
Story 2 – June 1, 2024 |
| 4 | Develop copy for 2 emails (including images from existing Energy Trust Photoshelter) using existing Energy Trust html email template. Emails are typically 300-500 words and include 2-4 images. Energy Trust will pay for purchased email lists using eTarget Media vendor and Mailchimp subscription. | May 31, 2024      |

**Submission Requirements and Guidelines**

To respond to this RFQ, response must be organized according to the following guidelines and submitted by the deadline indicated in Key Dates above. A maximum length of five (5) pages will be accepted, not including work samples or the Representations and Signature Page (Appendix A).

Respondents must submit all responses electronically via email to Ashley Bartels, Marketing Manager at ashley.bartels@energytrust.org. The electronic copy can be submitted as a PDF or secure Word file. Please clearly indicate “RFQ Response” in the subject line of the email submission. Questions about the RFQ may only be submitted in writing to ashley.bartels@energytrust.org.

**Submission Contents**

1. Respondent organization’s name and address
2. Primary representative’s name, phone and email
3. Estimated budget for services, broken down by task. Please include billing rates for all staff who would work on the project.
4. Relevant experience working with or creating advertising campaigns to reach small and/or rural businesses.
5. Relevant examples (up to 3) of past work that show your ability to deliver on the services listed in the scope of services section.
6. Disclosure of any direct or indirect, actual or potential conflicts of interest with Energy Trust or a statement that no such conflict of interest exists.
7. A signed and completed Representations and Signature page (Appendix A)

Signature Page
For Energy Trust to consider responses, respondents must submit the Signature page attached to this RFQ as Appendix A 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 5-page RFQ response limit.

Selection Criteria
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 by not limited to:

- The qualifications, strengths, or experiences do not align with the scope of services of this RFQ.
- The qualifications are inconsistent with Energy Trust policies or requirements.
- A conflict of interest exists.
- Cost and pricing concerns.

Agencies and professionals will be notified of selection via email.

Diversity, Equity, and Inclusion
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. Businesses that are formally certified by the Oregon Certification Office for Business Inclusion and Diversity (COBID) and/or firms federally certified in one or more of the socioeconomic programs managed by the Small Business Administration (SBA) are strongly encouraged to respond to this RFQ. Respondents are also strongly encouraged to provide information about awards, recognition, or organizational policies and practices relating to Diversity, Equity, and Inclusion.

RFQ Governing Provisions
By submitting a response to this RFQ, the 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
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 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.

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.

Additional Information
Energy Trust may request additional information.
Appendix A: RFQ Response Cover Sheet and Signature Page

I, the undersigned declare that;

1. I am an authorized agent of the respondent listed below after “Respondent Firm Name” (“Respondent”) and have authority to submit this submission on behalf of Respondent.

2. The information provided in this response is true and correct to the best of my knowledge.

3. I have read this Request for Information in its entirety and agree unconditionally to all of its conditions and governing provisions.

4. Respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham submission.

5. Respondent has not solicited or induced any other person, firm or corporation to refrain from proposing to this RFQ.

6. Respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.

7. Respondent's response is genuine; not made in the interest of, or on behalf of, any undisclosed person, firm or corporation; and is not submitted in conformity with an agreement of rules of any group, association, organization or corporation.

8. I authorize the representatives of Energy Trust to investigate the business history of Respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.

9. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while Respondent’s response is under consideration.

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

Date:

Respondent Firm Name:

Authorized Signature:

Printed Name:

Title: