

Energy Trust of Oregon

People Management Platform

Request for Qualifications (RFQ)

RFQ Issued: **April 17, 2024**

Questions Due: **April 22, 2024**

Proposals Due: **April 29, 2024**

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About Energy Trust

Since 2002, Energy Trust has been helping people in Oregon and Southwest Washington live better through energy savings and clean energy solutions. As a nonprofit 501(c)(3) organization funded through customer utility bills, Energy Trust is focused on helping communities improve lives today while creating a sustainable future for generations to come.

Energy Trust works hand in hand with customers, utilities, community-based organizations, and local governments. By combining resources, expertise, and connections with local knowledge and support, Energy Trust helps communities achieve shared goals through clean energy solutions.

The Oregon Public Utility Commission (OPUC) oversees Energy Trust's investment of utility customer funds and sets annual performance measures. Energy Trust investments in local energy projects that save energy and generate clean energy will save utility customers \$10.6 billion on their utility bills over the lifetime of those investments. Participating customers have already saved \$6.3 billion on their energy bills since 2002. Our work reduces overall energy costs for all utility customers, contributes to a stronger economy, builds resilient and sustainable communities and helps avoid carbon emissions.

Energy Trust is focused on advancing diversity, equity and inclusion with respect to our programs, seeking to continuously improve how we can better serve low- and moderate-income homeowners and renters, small businesses, communities of color and rural communities who have not benefitted from our programs in the past. We design and promote initiatives to increase information and access, and even change incentive offers, in order to increase participation across [Energy Trust's service area](#). Some of this work is laid out in our annual [Diversity, Equity and Inclusion Goals](#) and is now an integral part of our [annual goals](#).

More information about Energy Trust's background, funding sources, [Five-Year 2020-2024 Strategic Plan](#), annual budget and action plan, policies and programs are available on our website at www.energytrust.org/about.

Introduction

Energy Trust of Oregon ("Energy Trust") is inviting submission of qualifications for its People Management Platform project. The intent for this project is to find a new tool suite for the HR team to move away from our current manual processes, that will support more efficient workflows in multiple functional areas as Energy Trust continues to grow. We currently leverage ADP for payroll and benefits, and it is preferred that this new tool suite integrates with that system.

Through this Request for Qualifications (RFQ), we are requesting pricing to implement and maintain the proposed solution.

Responses to this RFQ must be delivered electronically to Energy Trust by 5 p.m. PT on **April 29th, 2024**. Energy Trust will not accept responses submitted after 5 p.m. PT. Please submit your response via e-mail to: andy.schiestl@energytrust.org (cc art.sousa@energytrust.org) with "People Management Platform RFQ Submittal" in the subject line.

Functional Requirements for the People Management Platform (HRIS)

Below, please find general descriptions of areas of functionality required for its People Management Platform (HRIS). **Please review the attached "Detailed Requirements" document for detailed descriptions of required functionality.**

Employee Onboarding/Offboarding Automation: Functionality that automates repetitive tasks associated with onboarding, such as collecting and verifying new hire information, setting up new hire accounts, and completing new hire paperwork. Provide new hires access to employee handbooks, policies, and training materials.

Performance Management Process: Functionality enabling managers to provide regular feedback, set goals, and track employee progress. Functionality to record employee achievements, training, and areas of growth.

Applicant Tracking System (ATS): Functionality allowing user to easily organize candidates for hiring and recruitment purposes. Functionality to collect candidate information, organize prospects based on experience and skill set, and filter applicants. System should also have the capability to comply with federal and state laws including but not limited to, collecting applicant demographic information, disability disclosures, etc.

Career Development Lattices (CDL): Functionality allowing users to easily navigate Energy Trust's CDL approach to career progression.

Additional details on requirements for each area of functionality and for the platform as a whole can be found in the attached requirements appendix.

Submission Requirements

1. **Product Description and Functionalities:** A narrative description of the system modules and confirmation of feature functionalities shall be provided to Energy Trust, to include the Contractor's approach for implementation of modules. The description of services should include initial implementation and ongoing support and maintenance service. A list of other services or additional work hours that may be provided at additional cost may be included. Technical aspects, capabilities, features, and options should be included using the spreadsheet in the requirements appendix.
2. **Security certifications:** Describe any applicable industry certifications for IT security, including but not limited to SOC 2 and ISO 27001 certification, and results of external security assessments. Identify and describe protection and security protocols, procedures and systems that would be utilized to protect Energy Trust confidential information from disclosure. Specific explanation of technological security should be given, including an explanation of the cloud storage services used.
3. **Project schedule or delivery timeline:** Contractor shall include a tentative timeline for implementation of the system.
4. **Qualifications and Experience (limited to 3-5 pages)**
 - a. Identify the project team roles (the members of the proposed Development and Support team), including team members and management, who will be providing services throughout the implementation and during ongoing support of the system.
 - b. **Diversity, Equity and Inclusion:** Provide specific examples of activities, projects or plans worked on or developed during the past 3 years that demonstrate how respondent promoted Diversity, Equity, and Inclusion (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 operations and strategy. If Contractor has an existing supplier diversity program, describe efforts respondent has made to increase business with woman-owned, minority-owned, and veteran-owned (including service-disabled veteran-owned businesses). Describe if your firm has a policy statement,

- participates in outreach activities, promote diverse firm subcontracting, publicizes contract opportunities, etc.).
- c. References: Please provide at least three references of clients for whom similar software system implementations were provided, including a description of work completed, dates of service, and contact information.
5. Price Proposal: Provide details of the cost for the proposal, including: a. Pricing that reflects the full scope of services in total; b. Itemized pricing for individual modules or module segments, training, implementation, migration, and other items in scope of service; c. All non-labor costs expected, including travel or other incidentals.

RFQ Governing Provisions

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.

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.

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.

Contractor Selection Criteria

Contractor 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 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.

Candidates may be contacted via email to schedule demo's, and the contractor selected will be notified of their acceptance via email.