

Energy Trust of Oregon

Request for Proposals:

Instructional Design Project

RFP Submission Deadline:
Month Date, Year, Time p.m. (Pacific)

RFP Issued: **April 9, 2025**

Proposals Due: **May 30, 2025**

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About Energy Trust

Energy Trust is a nonprofit organization selected and overseen by the Oregon Public Utility Commission to help utility customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista lower energy costs, increase energy savings, and generate renewable energy. Since 2002, our cash incentives, technical support, education, and strategic partnerships have helped customers save billions of dollars on their energy bills and achieve their energy goals.

Energy Trust serves a broad range of partners, stakeholders and customers, including people with low and moderate incomes, communities of color and rural communities. In all cases, our vision—clean, affordable energy for everyone—is the north star that guides our planning, decision-making and communication. In everything we do, we seek to improve lives today while creating a sustainable future for generations to come.

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.

Introduction

Energy Trust of Oregon is requesting proposals from instructional designers to increase the quality and quantity of in-house trainings provided by the Communications and Customer Service Team. The audience for these trainings is either Energy Trust employees who need to learn about Energy Trust systems, processes and customer service approaches, or external partners who need to learn about Energy Trust systems and processes as well as foundational clean energy industry knowledge. The anticipated duration of the contract is from May 1, 2025, through December 31, 2026, with a budget maximum of \$150,000.

Objectives

The objectives behind working with an instructional designer on in-house trainings is to:

- Incorporate best practices in adult learning and development
- Design trainings that are scaffolded into more advanced training
- Design trainings that can be accessed and navigated effectively across computers and mobile devices
- Ensure training is relevant, easy to comprehend and intuitive to navigate for individuals with diverse learning styles and varying levels of formal education
- Ensure the appropriate balance of in-person or virtual trainings versus on demand
- Provide Energy Trust learners and our partners with a range of training options, from micro-learning with voice overs to more in-depth trainings with frequent knowledge checks and skill demonstrations

Tasks

If selected through this Request for Proposals (RFP), it is anticipated that the selected contractor will be engaged by written contract to undertake the following major tasks.

Proposals should include the items and content specified in bold below.

Task 1. Project Kick-off Meeting and Onboarding

Energy Trust's customer service team will host a project kick-off meeting to onboard the instructional designer. This session will provide context to the curriculum designer on existing training efforts, where the team sees gaps, and will identify a list of staff to engage for the assessment. Communications about the project will also be discussed to ensure proper change management and awareness of this effort. Add language to explain we will review the proposed schedule and come to an agreement that

Task 2. Complete Training Analysis

During the project kick-off meeting, the Energy Trust team will provide the instructional designer with an assessment of the Communications and Customer Experience team's existing trainings (training title, learning objectives, delivery methods), and a draft list of 10 – 15 trainings that Energy Trust would like to develop. The instructional designer will review the existing trainings, assess effectiveness of current trainings delivery methods, and assess how best to create an integrated suite of trainings with the existing trainings and proposed new ones. The contractor will compile and complete the assessment by meeting with Energy Trust subject matter experts (SMEs), analyze current trainings, and conduct other activities that include, but are not limited to conducting needs analysis, determining training goals and objectives, assembling resources, creating learning materials, audience analysis, creating assessments, and determining delivery methods including finalizing the number of trainings to be developed.

Deliverables:

- Meeting notes
- Needs analysis report including proposed changes to existing trainings, and recommendations for how best to organize and present all trainings
- List of proposed new training titles, audience, learning outcome, performance objectives, training length

Task 3. Develop Work Plan

Following the staff meetings, the selected contractor will develop a project work plan with timelines, tasks, deliverables, and responsible parties (Energy Trust staff will review the work plan for up to two weeks before providing feedback). The work plan will

implement the findings of the assessment and analysis, and will include a prioritized list of all trainings to develop broken down by:

- Training title, goals & objectives
- Detailed course design/structure outline
- List of assessment tools and strategies
- Delivery methods/modality plan including which trainings need language translation and voiceover
- Audience
- Frequency delivered (i.e. weekly, monthly, quarterly, annually, etc.)
- Staff member/team responsible for training delivery
- Links to existing resources used to deliver training (i.e. PowerPoints, scripts, talking points, etc.

Task 4. Conduct Design & Development Meetings

After analysis, the selected contract will design the trainings, provide prototypes and drafts to the SME, and incorporate ongoing feedback from SMEs and Energy Trust staff.

Deliverables:

- Prototypes and/or sample modules
- Instructional materials
- Multimedia elements
- Final trainings approved by SME and Energy Trust staff

Task 5. Implementation Support

The selected contractor will ensure the course is ready to run and that all instructor materials and resources are ready for use. They will be available for in-the-moment updates during the initial rollout offering of each training to address course design and navigation issues as they arise.

Deliverables:

- Ready-to-run training course
- Updates to training content and materials

Task 6. Project Management

The selected contractor will manage all aspects of this instructional design project to ensure that it remains on-schedule and below the contract budget cap. Project

management will include hosting regular check-in meetings with Energy Trust staff while the work is taking place. The selected contractor will proactively advise on ways to maximize instructional design progress throughout the project.

The selected contractor will be required to submit monthly status reports presenting the following:

- A summary of accomplishments during the previous month.
- Current month's activities and plans.
- Variances in schedule or budget, including any necessary explanations.
- If applicable, any issues or concerns to be addressed with proposed solutions.
- Compliance with supplier diversity requirements (see Proposal Requirements), including current and total amounts invoiced to date for COBID-certified firms relative to total contract spending.

These reports are due by the 10th of every month and must accompany the invoice, starting with the first month after work begins.

Deliverables:

- Regular check-in meetings with Project Manager
- Monthly status reports

Task 7. Reporting

The selected contractor will produce a final report after all trainings have been developed. The final report will include recommendations for Energy Trust on how best to:

- Maintain and update developed trainings
- Cultivate a culture of learning and development withing CCS
- Identify a suitable learning management system for Energy Trust trainings
- Develop new trainings and incorporate into exiting training system

For accessibility, main text will be at least 11 pt font; footnotes and figure captions must be at least 8 pt.

The selected contractor will produce a draft final report and provide it to Energy Trust. The draft report will be reviewed and commented on by Energy Trust staff. The selected contractor should assume a review window of two weeks for the draft final report. Upon receiving feedback on the draft, the selected contractor will make revisions and deliver to Energy Trust a final version of the evaluation report within three weeks. Achieving an acceptable final report may take more than one iteration between the contractor and Energy Trust. Findings and conclusions shall be based on the information collected by the selected contractor and referenced in the reports.

Deliverables:

- Draft and final report

Proposal Requirements

RFP Response Requirements ([click here to apply](#))

To be considered complete, applicants must [submit a completed application](#) answering all of the questions.

RFP Governing Provisions

By submitting a response to this RFP, respondent represents that it is authorized to submit a response and explicitly agrees and accepts the following provisions of this RFP and all other terms and conditions set forth in this RFP.

RFP Application:

Link to existing application: [Instructional Designer - Energy Trust of Oregon](#)

Instructional Designer Respondents

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 respondent's proposal without scoring.

- Instructional design proposal
- Proposals of the project team and staffing plan
- Proposed budget
- Diversity, equity, and inclusion responses
- Work product example

Schedule & Administration of Proposal Selection Process

RFP Schedule

- **April 9, 2025** RFP issued
- **April 25, 2025** Questions/request for additional information due
- **May 9, 2025** Clarifications/question responses posted to website
- **May 30, 2025** **Proposals due**

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFP, as well as stating intent to bid on the project, must be submitted via email to the contact named below by **April 25, 2025**. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than **May 9, 2025**. Energy Trust cannot accommodate individual phone, mail, or fax inquiries about the RFP. 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 5pm Pacific Time on **May 30, 2025**. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFP. Please submit proposal to:

Cameron Starr
Customer Experience Operations Lead
Energy Trust of Oregon
Email: Cameron.starr@energytrust.org

Revisions to RFP

If it becomes necessary to revise any part of this RFP, 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 RFP. Clarification given by Energy Trust may become an addendum to the RFP.

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).

RFP Governing Provisions

All responses to this RFP are subject to the following provisions:

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, to negotiate any of the details of the proposal prior to contracting, and award any ultimate contract in whole or in part as it is deemed in Energy Trust's best interest.

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. Except in the case of litigation or other legal disclosure and/or audit requirements, Energy Trust will not disclose information submitted in response to an RFP to any third party.

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.

No Verbal Addendums

Any clarification or interpretation of the RFP documents shall be issued in writing by Energy Trust. 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 bind Energy Trust nor add to, detract from, affect or modify the terms of this RFP. Any addendum to this RFP will be in written form.

Respondent Costs

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

Waiver of Claims

Respondent waives any right it might otherwise have to bring any claim, whether in damages or equity, against Energy Trust, Energy Trust Board of Directors or any Energy Trust agents, employees or contractors, with respect to any matter arising out of any process associated with this RFP.

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 RFP, Energy Trust may in its sole discretion do any one or more of the following:

- Determine which responses are eligible for consideration in response to this RFP.
- Disqualify responses that do not meet the requirements of this RFP, in the sole determination of Energy Trust.
- Negotiate with any respondent to amend any response.
- Select and negotiate and/or enter into agreements with respondent(s) who, in Energy Trust's sole judgment, are most responsive to the RFP and whose responses 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 information or responses, including withdrawing this RFP at any time and/or issuing a new RFP that would supersede and replace this one, or issuing a follow-up solicitation.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further information gathering or solicitation process on any terms and conditions.
- Suspend or modify the RFP process at any time.
- Enter into relationships with more than one respondent.

Resulting Contract(s)

The selected respondent or respondents will be required to execute a written contract with Energy Trust to perform contractor services as determined between Energy Trust and the selected respondent. 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 written contract has been executed by and between Energy Trust and the selected respondent.

Key terms in any resulting contract include, but would not be limited to, the following: Appropriate business licensing, timely and accurate invoicing requirements, intellectual property provisions ensuring the work product developed for Energy Trust by the contractor or its subcontractors shall be the property of Energy Trust, use of Energy Trust consent forms when referencing Energy Trust participant or project information, conflict of interest disclosure requirements, confidential information nondisclosure

requirements, indemnification for third-party claims and limitation of liability provisions, and insurance requirements.

Time is of the essence with regard to these services 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.

Appendix A: Representations 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. The information provided in this proposal is true and correct to the best of my knowledge.
2. The information provided in this response is true and correct to the best of my knowledge.
3. I have read this Request for Proposals 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 proposal.
5. Respondent has not solicited or induced any other person, firm, or corporation to refrain from proposing to this RFP.
6. Respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. 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 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 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: _____

Respondent Firm Name: _____

Authorized Signature: _____

Printed Name: _____

Title: _____

