

## 4.14.000-P Approve a Policy on Oregon Preference

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| <b>History</b>                      |                    |                     |                         |
|-------------------------------------|--------------------|---------------------|-------------------------|
| <b>Source</b>                       | <b>Date</b>        | <b>Action/Notes</b> | <b>Next Review Date</b> |
| Board Decision                      | October 1, 2003    | Approved (R207)     | October 2006            |
| Policy Committee                    | September 21, 2006 | No changes          | October 2009            |
| Policy Committee                    | November 4, 2009   | No change           | October 2012            |
| Board Decision                      | November 19, 2012  | Amended (R649)      | November 2015           |
| Board Decision                      | April 1, 2015      | Amended (R740)      | April 2018              |
| Policy Committee                    | March 5, 2018      | No change           | March 2021              |
| Nominating and Governance Committee | June 10, 2024      | No change           | May 2027                |

### **Purpose**

To give preference to Oregon contractors competing for major Energy Trust contracts if price, fitness, availability and quality are otherwise equal.

### **Background**

This policy emerged from discussion with Energy Trust advisory councils in 2003. At that time, Energy Trust also considered provisions of Oregon law that apply to public agency contracts. Energy Trust is not bound by these laws but these provisions were informative. In advisory council discussions, there was general support for the concept of giving preference to an Oregon contractor if competing bidders score equally on other selection criteria.

### **Policy**

**If price, fitness, availability and quality are otherwise equal, Energy Trust will give preference to a bidder whose goods or services are produced, acquired, or available in the State of Oregon.**