

REQUEST FOR QUALIFICATIONS (RFQ)

FOR WRITING PROFESSIONALS POOL

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c)(3) corporation, seeks qualifications from **writing professionals to research, write and/or copy-edit external energy efficiency and renewable energy communications and marketing materials on a periodic and as-needed basis**. Energy Trust seeks to select and maintain a pool of qualified writing professionals for this type of work.

Energy Trust has a commitment to [diversity, equity and inclusion](#). Energy Trust is interested in improving how we reach and serve communities, business and individuals who have not yet participated in our programs. Energy Trust encourages writers and writing firms who bring lived experience and perspective from diverse, rural and low-income communities to submit their qualifications to our writing professionals pool. Energy Trust staff will provide background information to writing professionals selected for this pool so they can learn more about Energy Trust and about our work.

Energy Trust has a variety of research, writing and copy-editing needs that occur throughout the year. Total and aggregate budget for all professional writing services biannually is not expected to exceed \$100,000. Writing professionals will be selected for the pool on a rolling basis through January 30, 2021, in accordance with the RFQ Schedule outlined below and based on their relevant experiences, rates and costs, and quality of samples provided.

Writing professionals accepted into the pool as a result of this RFQ may also respond separately to other communications projects for Energy Trust. Please note that the writing professionals selected through this RFQ would be eligible to receive contracts for the tasks and projects described, but no contracts are guaranteed even once a writing professional is accepted into the pool. Any questions may be directed to Chris Holloway, marketing assistant, at chris.holloway@energytrust.org.

Energy Trust Overview

Energy Trust is an independent nonprofit organization dedicated to helping Oregon customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista, and Washington customers of NW Natural, invest in and benefit from energy efficiency and renewable energy development. Our mission is to “change how Oregonians produce and use energy by investing in efficient technologies and renewable resources that save dollars and protect the environment.”

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

Submission Requirements

Responses containing the information, and in the format, required below must be submitted electronically only to Chris Holloway, production manager, at Chris.holloway@energytrust.org

1. Experience and Consultant Requirements, Rates (up to 3 pages):

Please provide a cover letter describing your qualifications and rates (maximum of 3 pages) that addresses each of the following requirements:

- Disclose rates associated with the services you provide. Specifically include hourly costs for services described in this RFQ. Energy Trust is interested in time and material pricing for key staff members.
- List relevant experience reaching diverse audiences with marketing-oriented writing, as well as any relevant experience communicating technological information.
- Provide contact information (company/individual name, title, phone number, email and address) for three professional references regarding your relevant project experience.

2. Samples of work and information on staffing (up to 10 pages):

Provide as attachments totaling no more than 10 pages the following:

- Three to five varied examples of external print or online communications and reports, or other work product you have produced in your relevant project experience. Energy efficiency, renewable energy or general sustainability samples are preferred.
- Short biographies or resumes, including relevant licenses, certifications and training, of key staff that would be assigned to the types of contract scopes, projects and tasks as described above, and provide information regarding their availability during 2021.

3. 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 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 of 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.

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.

RFQ Background

Energy Trust provides information, technical assistance and cash incentives for energy efficiency and renewable energy investments made by the customers of partner utilities. Energy Trust electric efficiency and natural gas efficiency programs are available to residential, commercial, industrial, agricultural and public sector customers. Energy Trust renewable energy programs provide support for a range of renewable generation resources, including solar, that are less than 20 megawatts in size.

Because Energy Trust serves a broad range of customers, our writing needs vary. Some are quite technical on energy efficiency or renewable energy systems, while others are intended for more general business or consumer audiences. In all cases, we are seeking to help our potential customers see themselves as reflected in our work, and to be able to understand if and how taking advantage of Energy Trust programs can fit into and help their business or home life. We communicate the availability of program opportunities and the benefit of customer investments through a variety of print and online approaches.

Energy Trust seeks qualified writing professionals to research, write and/or copy-edit market-facing energy efficiency and renewable energy communications and marketing materials. Audiences for these materials include customers and customer groups, including homeowners, renters, commercial and industrial business owners and managers, nonprofit organizations, public sector and renewable energy developers; trade ally contractors; and external stakeholders, including public interest groups, trade organizations and legislative bodies.

Potential projects to be taken on by selected writing professionals may include:

- Energy Trust organizational and program fact sheets, brochures, press releases, web copy, blog posts, newsletters, e-newsletters, advertisements, visually displayed information (“information graphics”) and other materials
- Customer testimonials, success stories and case studies including interviews, research, writing, copy editing, photography shot list development and customer approvals
- Public annual report development including a creative brief, interviews, research, writing, copy editing, photography coordination and customer approvals
- Utility newsletter stories, bill inserts and direct mail communications
- Public presentations including speeches and PowerPoint presentations

In addition to the content creation work, selected writers may also be responsible for working directly with customers to obtain their written customer consent to feature their stories, and also scheduling photo shoots at customer sites. All materials are intended to demonstrate the value of energy efficiency and renewable energy in general and the benefits of engaging with Energy Trust programs to complete energy efficiency upgrades and install renewable energy systems.

The communications will be distributed in several ways: posted on www.energytrust.org, linked from professional trade organization websites, promoted in electronic newsletters, provided to

customers, the public and interested parties, and other uses. Energy Trust will be the sole owner of all communication assets created but will allow use of the communication on a case-by-case basis.

RFQ Schedule

Statements of qualifications will be accepted through January 30, 2021. Respondent submissions will be reviewed as they are received, and respondents will be notified of acceptance into the pool no later than March 15, 2021.

Description of Possible Contract Scopes and Tasks

Energy Trust is looking for writing professionals with interest in and/or knowledge of effective methods for communicating energy efficiency and renewable energy opportunities, benefits and results to customers and stakeholder. Writers should also have a track record of managing communication projects that were delivered on-time, on-budget, error-free and were well received by the end audience.

The written materials must fit into the Energy Trust brand and style guidelines, to be provided. Specific guidelines will be provided as projects are assigned.

Summary of Work Deliverables (deliverables vary by project):

- Project timeline and budget based on project scope provided by Energy Trust
- Development of project brief or outline for approval, if requested for more complex projects
- Handling confidential Energy project data and customer data
- Rough drafts and completed, final copy
- Completed Energy Trust media release forms for anyone interviewed, quoted and/or photographed