

Energy Trust of Oregon Existing Buildings Program

Request for Qualifications

Small Business Offering: HVAC, Refrigeration and Insulation

RFQ Issued: March 17, 2021

Qualifications Due: April 12, 2021

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1. Introduction

Energy Trust of Oregon, Inc. (“Energy Trust”) is seeking qualified contractors to serve small businesses in Oregon and Southwest Washington as part of a new initiative, the Small Business offering. The selected contractors will enroll to be an Energy Trust Small Business trade ally. The number of Small Business trade allies selected for participation will be limited and only participating trade allies will be eligible to offer Energy Trust’s increased incentives to customers.

The Small Business offering is designed to deliver Energy Trust services to a larger number of small businesses by providing them with access to instant discount cash incentives. These incentives are greater than are available through Energy Trust’s standard offerings and are only available through the pool of selected, participating Small Business trade allies (“participating trade allies”). For the purpose of this offering, “small business” means the customer’s existing building size is 20,000 sq. ft. or less.

The goals of Energy Trust’s Small Business offering are to support small business by:

- Improving comfort and energy savings
- Reducing upfront capital cost for improvements
- Increasing program participation and services for small businesses, communities of color, rural communities, and people with low and moderate incomes

To participate in the offering, the small business customers must meet program-specified eligibility criteria and be served by one or more of Energy Trust’s partner utilities: Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, or Avista in Oregon or by NW Natural in Southwest Washington.

Energy Trust expects to execute trade ally enrollment and participation agreements with selected contractors in late April 2021. The anticipated launch date for the offering is May 10, 2021.

For more information, definitions, and terms referenced in the RFQ, please review [Appendix B](#) Definitions and Resources.

A. About Energy Trust

Energy Trust is an independent nonprofit organization, selected and overseen by the Oregon Public Utility Commission to lead Oregon ratepayers in benefiting from saving energy and generating renewable energy. Energy Trust operates under a [Five-Year 2020-2025 Strategic Plan](#) that sets aggressive savings and generation goals. The plan includes strategies for continuously improving program designs and services, managing the total cost of delivering energy efficiency, expanding customer participation, and replenishing the energy-efficiency resource through a portfolio of new technologies and product development strategies.

Energy Trust’s services, cash incentives, and solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas, and Avista save nearly \$8.2 billion on their energy bills. Since 2002, the organization’s leadership has been a contributing factor in the region’s low energy costs and in building a sustainable energy future. More information about Energy Trust’s background, funding sources, strategic and action plans, policies, and programs are available on our website at www.energytrust.org/about.

2. Small Business Trade Ally Description of Work

Participating trade allies will be trained to accurately communicate and represent Energy Trust's Small Business offering requirements and incentives when they visit small businesses. As a program representative, they will provide advisor-level support for each customer from start to finish, serving as their single point of contact with Energy Trust for their customer's project while installing a range of HVAC, insulation, and refrigeration energy-efficient equipment that meets program requirements and technical specifications.

Participating trade ally benefits include:

- Cash incentives paid directly to the trade ally
- Increased incentive levels for specific energy-efficient equipment
- Access to Energy Trust tools and resources
- Support services, partnerships, and resources to help grow your business

Participating trade allies will have access to vetted leads and outreach support from the trade ally coordinator and Energy Trust staff. Energy Trust will provide marketing support for the Offering by making co-branded flyers and other program collateral available to participating trade allies.

Participating trade allies will be eligible for Business Development Funds to offset the cost of their marketing efforts. Find more information at <https://insider.energytrust.org/programs/existing-buildings/business-development-fund-guidelines/>.

A. Trade Ally Participation Requirements

Participating trade allies will be responsible for abiding by Energy Trust's communicated participation requirements for the offering, performing outreach to eligible small business customers, and reducing the customers' cost for qualifying energy-efficient equipment installations by the amount of the Energy Trust increased incentives. The Energy Trust incentives will be paid directly to the participating trade ally. Participating trade allies will use their smart device (i.e., phone, tablet) to conduct onsite walkthrough energy assessments using a licensed, web-based software tool called "Onsite."

Participating trade allies training and support will include:

- Welcome and kick-off training to learn program Offering requirements and meet other participating trade allies
- Bi-weekly one-on-one meetings with trade ally coordinator to review potential projects and leads and provide individual training and support
- Training to learn how to conduct walkthrough energy assessments, using the OnSite software, and generate reports of energy opportunities for customers

Participating trade allies will be responsible for:

- Completing a walkthrough site assessment, using the program-provided OnSite Assessment Tool (web-based assessment tool, no cost to trade ally to use)
- Installing qualifying equipment/systems in eligible small businesses

- Providing Energy Trust's incentive to customers upfront, thereby reducing or eliminating the customer's out-of-pocket cost
- Educating small businesses about the proper use and maintenance of the installed equipment; and
- Submitting all required paperwork, electronically, for incentive processing and payment no later than 30 days after project installation.

Interested contractors are invited to respond to the RFQ as specified in [Section 3](#). In responding to this RFQ, among other things, Respondents should specify the equipment and services the Respondent is proposing to use to deliver the Small Business offering to its customers.

Respondents are not required to offer all equipment options or every type of service available under offering. Preference for selection will be given to trade allies with one or more of the following:

- Rural area service coverage
- Speak multiple languages
- Business located in Energy Trust service territories
- Small business (see [Appendix B](#))
- COBID-certified/COBID-eligible business (see [Appendix B](#))

Individuals or companies responding to this RFQ ("Respondents") may submit qualifications that address one or more of the Energy Trust regions (see [Appendix A](#)). The use of subcontractors to achieve goals in this Small Business offering is allowed when needed; the participating trade ally will be responsible for ensuring that its subcontracted team members meet Energy Trust's participation requirements.

3. RFQ Process and Application Instructions

A. Questions or Requests for Additional Information

Any questions and/or requests for clarification or additional information regarding this RFQ should be submitted in writing, via email, or by phone and received by **March 22, 2021, at 5:00 p.m. PDT** to the RFQ point of contact, Chris Crockett, at EnergyTrustSB@nexant.com, 503-360-3555. These emails should be clearly labeled with the subject line "**Request for Clarification—Small Business RFQ.**"

Energy Trust staff is not available for conversations with individual Respondents and will only intake questions via phone submission but will not answer questions via the phone. This is an optional question intake process only. Confirmation of receipt of written inquiries will be sent via reply email within one business day. All questions, requests for clarifications, or additional information will be anonymized and will be addressed during the first informational webinar and posted on the Energy Trust website under [RFPs and RFQs](#).

B. How to Apply

To respond to this RFQ, complete the following steps:

Step 1: Fill out and submit the separate **Small Business Trade Ally Application** form. Respondents can either complete and submit the Fillable PDF form or submit using Energy Trust's application web form: <https://www.energytrust.org/qualifications-application-form/>

Applications should address the Respondent's experiences, qualifications, and ability to perform all responsibilities as described in this RFQ. Energy Trust may determine that applications that do not include all of the following sections and information are unresponsive and disqualified from further review.

Step 2: Applications must be submitted by **April 12, 2021, at 5:00 p.m. PDT** via one of the following methods:

- Submit electronically to Chris Crockett at EnergyTrustSB@nexant.com
- Submit by fax to 503-243-1154
- Submit using the web form: <https://www.energytrust.org/qualifications-application-form/>

Confirmation of receipt will be sent via reply email or phone call within one business day. If you do not receive a confirmation email or phone call, please send a follow-up email to EnergyTrustSB@nexant.com. Energy Trust will not be obligated to consider information received after the submission deadline.

C. RFQ Response Review Process

The RFQ response is a two-phase review and selection process. The first phase will consist of Energy Trust’s team reviewing the submitted Small Business Trade Ally Applications ([Appendix A](#)). Energy Trust will then invite all Respondents who meet the phase one review criteria for interviews – see the [Schedule](#) timeline below. Energy Trust will complete the scoring for each Respondent after the Respondent’s interview and make final selection. Respondents will be notified of the outcome of the RFQ selection process.

	Phase 1	Phase 2
Type	Application Form: Qualifications	Interview: Business Model
Content	<ul style="list-style-type: none"> • History of completed projects • Team credentials • Insurance requirements • Business location (rural priority) • Service territory (rural priority) • Types of customers/market • Languages spoken • Oregon- or Washington-based • Company certifications (e.g., small business, women or minority-owned) 	<p>Installation Practices:</p> <ul style="list-style-type: none"> • Installation and quality control procedures • Equipment offerings • Safety protocols <p>Customer Service Model:</p> <ul style="list-style-type: none"> • Customer relations/feedback • Incident support <p>Sales:</p> <ul style="list-style-type: none"> • Marketing/sales strategies • Partnerships • Customer education <p>Diversity, Equity, and Inclusion:</p> <ul style="list-style-type: none"> • Company commitment to diversity
Estimated completion time	Less than 1 hour	~ 1 hour

D. Schedule

Posting of Request for Qualifications	Wednesday, March 17, 2021, 5:00 p.m.
Deadline to submit written questions and requests for information	Monday, March 22, 2021, 5:00 p.m.
First informational webinar: submitted questions/requests for clarifications answered, the recording will be posted on the Energy Trust website under RFPs and RFQs	Tuesday, March 23, 2021, 10:00 a.m.
Second informational webinar: walkthrough application form and interview process	Tuesday, March 30, 2021, 10:00 a.m.
Application submittal deadline	Monday, April 12, 2021, 5:00 p.m.
Invitations for interviews issued	Friday, April 16, 2021
Interviews conducted	Tuesday, April 13 - Friday, April 23, 2021
Selection and notification to Respondents	Week of April 26, 2021
Selected Respondent orientation/training	Week of May 3, 2021
Launch of the Small Business offering	Monday, May 10, 2021

All times are displayed in Pacific Time. Informational webinars will be conducted on Zoom. More information will be available at [RFPs and RFQs](#)

E. Withdrawal and Modification of Application or RFQ

Respondents may withdraw their submitted application and resubmit before the response deadline. After the response deadline, Respondent-initiated changes will not be accepted unless Energy Trust, in its sole discretion, determines otherwise. The respondent may withdraw their application in response to this RFQ from consideration at any time.

Any material submitted by a Respondent will become the property of Energy Trust. Energy Trust may amend the RFQ at any time before the application due date by the issuance of a written amendment to all Respondents participating in the process and will be posted on the Energy Trust's website under [RFPs and RFQs](#). Energy Trust may also cancel, delay, or suspend this solicitation if in the best interest of Energy Trust. Energy Trust may reject any or all qualifications, in whole or in part, if in the best interest of Energy Trust as determined by Energy Trust.

4. Qualifications Evaluation

Selection Criteria

Selection for offering participation will be at the sole discretion of Energy Trust. A team of reviewers consisting of Energy Trust staff and experts from external organizations will evaluate the responses. All external reviewers sign confidentiality agreements related to their review. Applications may be eliminated from consideration at Energy Trust's sole discretion for any reason including, but not limited to:

- The application is substantially incomplete;
- The application is not responsive to the objectives and requirements of this RFQ;
- The Respondent firm or team has not demonstrated financial stability;
- The application is inconsistent with Energy Trust policies or requirements; or
- Energy Trust determines that a conflict of interest exists.

Energy Trust may consider Respondents for future projects and other Energy Trust opportunities.

5. Governing Provisions

All submitted qualifications are subject to the following governing provisions:

Agreement to All Terms

By submitting a response to this RFQ, the Respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and the Respondent 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 to purchase goods or services with any 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 portions for their responses 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.

Respondent Expenses and Waiver of Claims

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. Respondent waives any right it might have to bring a claim against Energy Trust, its Board of Directors, employees, contractors, or agents with respect to any matter arising out the RFQ.

APPENDIX B. DEFINITIONS AND RESOURCES

RFQ Definitions

TRADE ALLY is contractor, manufacturer, installer, or service provider that promotes or installs energy-efficient equipment meeting Energy Trust program requirements and technical specifications. The Trade Ally has executed an enrollment agreement with Energy Trust to participate in its programs and act as an Energy Trust program ambassador in the field.

COBID is the Certification Office for Business Inclusion and Diversity. This is a state of Oregon program that certifies “disadvantaged business enterprises, minority-owned businesses, woman-owned businesses, businesses owned by service-disabled veterans and emerging small businesses” to promote “business inclusion and diversity.”

COBID CONTRACTOR is a contractor that has been certified by the Certification Office for Business Inclusion and Diversity. See [Oregon4Biz](#) for more information on the certification process and resources to help get started.

PROJECT is defined as a completed installation at a unique small business site.

RURAL is defined as towns with a population less than 2,500. See [Rural America by the Census Bureau](#) for more information.

SMALL BUSINESS is defined as a business with 20 employees or less.

SMALL BUSINESS SITE is defined as a business location with a footprint of 20,000 sq. ft. or less.

Resources

TRADE ALLY FACT SHEET ([link](#))

INSIDER TRADE ALLY NEWSLETTER ([link](#))

ENERGY TRUST’S DIVERISTY, EQUITY, AND INCLUSION OPERATION PLAN ([link](#))