

Energy Trust of Oregon **Media Buying and Creative** **Marketing Services Contractor** **Request for Qualifications (RFQ)**

RFQ Submission Deadline:
October 19, 2022, 5:00 p.m. (PDT)

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Table of Contents

1. Introduction.....	3
Key Dates	3
About Energy Trust.....	3
2. Media Buying and Marketing at Energy Trust.....	4
3. Scope of Services.....	5
4. Budget.....	6
5. Submission Requirements and Guidelines	6
Signature Page	7
Submission Contents	7
Interviews.....	8
6. Contractor Selection Criteria	9
7. Resulting Contract.....	10
8. RFQ Governing Provisions	10
Right To Accept or Reject	10
Resulting Contract	10
Confidentiality	11
Ownership of Responses	11
No Verbal Addendums	11
Respondent Costs	11
Waiver of Claims.....	11
Energy Trust Rights Reserved	11
Conflict of Interest.....	12
Additional Information	12
Appendix A: RFQ Response Cover Sheet and Signature Page	13

1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is issuing a Request for Qualifications (RFQ) for a Media Buying and Creative Marketing Services contractor. The selected contractor will work with Energy Trust to provide media buying for traditional, programmatic digital and search engine advertising, as well as other creative marketing services described below, with the goal of driving program participation and building brand awareness with customers and stakeholders.

The resulting contract will be for two years with one additional one-year extension option at Energy Trust's discretion and based on achievement of specified contract performance metrics, including but not limited to possible requirements around subcontracting with certified diverse subcontractor entities.

An incumbent firm has been providing the media buying services described in this RFQ since 2021. Energy Trust will examine all proposals carefully and with equal consideration.

Key Dates

Responses must be submitted electronically, in PDF format, by October 19, 2022, at 5:00 p.m. (PDT). A maximum length of 10 pages will be accepted, not including the Representations and Signature Page (Appendix A) or work samples.

RFQ posted	September 28, 2022
Proposal due	October 19, 2022 5:00pm (PDT)
Notify of interviews	October 28, 2022
Interviews	November 1-November 4 2022
Inform selected contractor	November 7, 2022
Scope/contracting begins	November 14, 2022
Contracting complete/work begins	January 3, 2023

About Energy Trust

Energy Trust of Oregon is an independent nonprofit organization dedicated to delivering energy efficiency and renewable power programs to 2 million utility customers. We are funded by and serve Oregon customers of Portland General Electric, Pacific Power, Cascade Natural Gas and Avista, and Oregon and Washington customers of NW Natural. A non-stakeholder board of directors guides our work with input from three advisory councils, and we are overseen by the Oregon Public Utility Commission. Since 2002, our technical services, cash-back incentives and energy solutions have helped participating customers save more than \$5.3 billion on their utility bills. The cumulative impact of our leadership has been a contributing factor in keeping our state's energy costs as low as possible, adding renewable power to the grid from small and medium-scale projects, and 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.

Energy Trust is committed to advancing diversity, equity and inclusion by better meeting the needs of low- and moderate-income homeowners and renters, small businesses, and those in communities of color and rural communities who we have not successfully served. . We design and promote targeted initiatives to increase access to information , services and incentives to increase participation across [Energy Trust's service territory](#). Some of this work is laid out in [Diversity, Equity and Inclusion Goals](#).

Energy Trust also supports supplier diversity in its procurement processes. Successful respondents must include a plan for subcontracting at least 20% of the value of the contract with Oregon Certification Office for Business Inclusion and Diversity (COBID) certified firms, unless the prime respondent is itself COBID certified.¹

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

2. Media Buying and Marketing at Energy Trust

Media buying is a critical aspect of brand and program integrated marketing strategies to raise awareness of Energy Trust among communities, customers and stakeholders and to drive participation in our programs and services. We leverage a full array of traditional and digital advertising as well as targeted outreach activities to reach the following audiences:

- Residential customers eligible for energy efficiency and solar programs (includes renters and homeowners in manufactured homes, apartments, condos and single-family homes), with a focus on customers Energy Trust has previously underserved (communities of color, Spanish speaking customers, customers with low incomes and rural communities)
- Business customers eligible for energy efficiency and solar programs (includes multifamily property managers and owners, small, medium and large commercial and industrial businesses, commercial developers, nonprofit organizations, government agencies, farms and wood products) with a focus on customers Energy Trust has previously underserved (communities of color, Spanish speaking customers, customers with low incomes and rural communities)
- Stakeholders (includes peer organizations, community-based organizations, government agencies and elected officials) with a focus on those representing customers Energy Trust has previously underserved (communities of color, Spanish speaking customers, customers with low incomes and rural communities)

A key focus of our media buying and marketing activities is to deliver messaging, strategies and creative materials that advance diversity, equity and inclusion objectives and to reach

¹ COBID certifies minority-owned, women-owned, and service-disabled veteran-owned business owners and emerging small businesses interested in contracting with state, county, and city government agencies.

customers who we have not successfully served, including supporting collaborations with community-based organizations, highlighting community voices and expanding program reach and participation in culturally and economically diverse and rural areas.

In Q4 of 2022, Energy Trust is completing a brand marketing strategy and plan to ensure that the brand is positioned to deliver on the organization's strategic plan and help Energy Trust reach customers it has underserved. The brand strategy and plan along with annual program marketing plans will guide media buying strategy in 2023.

The selected contractor will work with two groups at Energy Trust to plan, develop and implement media buying and other marketing services: Communications and Customer Service (CCS) and Program Marketing. CCS delivers brand marketing campaigns and strategies to describe the value of Energy Trust's work and build awareness of energy efficiency and renewable energy. Program Marketing delivers business-to-business and business-to-consumer marketing campaigns and strategies to support program awareness and engagement objectives.

3. Scope of Services

Energy Trust is looking for a contractor that can quickly and cost-effectively get up to speed on our organization and programs, as well as the communities we serve and our role in the energy industry. The RFQ seeks expertise in two main areas of work. The first is media buying to place advertising across the state, with particular focus on rural areas, communities of color, low-income customers and Spanish-speaking customers and, upon identification of qualified media buying service providers, enter into contract(s) for those services. The second is marketing creative services in support of Energy Trust's brand marketing activities. The primary objective of the services sought is to raise awareness of Energy Trust's value and offerings and motivate customers to act, particularly among rural communities, communities of color, Spanish-speaking customers and low-income customers.

All activities will align with Energy Trust's brand strategy, brand marketing plan, organizational public relations strategy and program marketing plans and campaigns. Contractor will also collaborate and coordinate with other external contractors or agencies as needed to ensure media buying and other marketing activities align across the organization and programs. Activities will include:

- **Developing statewide and SW Washington targeted, multicultural and community-specific media buying strategies for brand, B2B and B2C marketing campaigns** for both English and Spanish language audiences in the following areas: Traditional advertising (radio, broadcast television, print, and outdoor), programmatic display (all digital that is purchased based on target audiences rather than specific websites), and paid social. Energy Trust will provide the overall advertising strategic direction, targeting information, advertising goals and approvals, and the media buyer will contribute subject matter expertise to draft, refine and adjust strategies.
- **Executing campaign media buys** through contracts with individual media service providers, ensuring that creative provided by Energy Trust and its other marketing vendors is trafficked with each outlet on the required timeline, and acting as main

contact for Energy Trust on all media buying inquiries. Campaign development and execution is the work of multiple teams, and the media buyer will be involved in collaborative work with other agencies.

- **Provide reporting on media buying budget and effectiveness**, including real-time dashboard access to trafficking and spending in progress, a campaign mid-point summary report and a campaign final summary report within two weeks of the end of a campaign media buying period. Reporting will include data identified for each campaign, such as number of impressions, when and where the TV and Radio spots ran, number of clicks (online), click thru rates, cost per click and other reporting data identified by Energy Trust.
- **Evaluate and provide expert analysis of advertising opportunities that arise outside of planned campaign buys** by surfacing or responding to media service provider inquiries or interest areas identified by Energy Trust during the course of the contract term. A small annual contingency budget will be reserved for funding these types of opportunities if approved by Energy Trust.
- **Provide creative marketing services in support of brand advertising campaign activities**. This work may include development and production of original traditional (radio, TV, print) and digital creative and updates to existing creative based on changing strategic direction, specific community or audience targeting needs or new opportunities that surface through media buying strategy and activities.
- **Provide creative marketing services in support of community-specific outreach and events**. Energy Trust outreach managers work with communities and customers statewide, including focus areas of rural, moderate and low-income customers, communities of color and Spanish-speaking customers. Contractor may be involved in developing and/or supporting the creation or update of collateral (brochures, info sheets, guides) intended to strengthen relationships and expand awareness of Energy Trust and its offerings.

4. Budget

The 2023 budget for the scope of services described in this RFQ is roughly \$1.6 million and is expected to remain at that level for the next three years. Energy Trust will provide budget splits between brand, B2B and B2C advertising content. Energy Trust generally runs two campaigns per year, one in the Spring and one in the Fall. There may be additional, smaller campaigns or opportunistic media buying to achieve organizational goals in addition to the three main campaigns. The brand creative marketing services described in the scope of services above are also included in this budget and account for approximately \$200,000 of the total estimated \$1.6 million budget.

5. Submission Requirements and Guidelines

Responses to this RFQ must be organized according to the following guidelines and submitted by the deadline indicated in Section 1 (Key Dates). A maximum length of 10 pages will be accepted.

Respondents must submit all responses electronically via email to Sloan Schang, Marketing and Communications Lead at sloan.schang@energytrust.org. The electronic copy can be submitted

as a PDF or secure Word file. Please clearly indicate “RFQ Response” in the subject line of the email submission. Questions about the RFQ may only be submitted in writing to sloan.schang@energytrust.org.

Signature Page

In order for Energy Trust to consider responses, respondents must submit the Signature page attached to this RFQ as Appendix A as the cover page to its response. The Signature page must be signed by a duly authorized officer or agent of the respondent company submitting the response. The signature page does not count against the one-page RFQ response limit.

Submission Contents

The main submission is limited to **10 pages, excluding required attachments** and must include the following details and information about your company, services and experience.

1. Company Overview and Account Management Approach

- Company size and office location
- The amount of time the respondent has been providing media buying and creative marketing services
- General description of media buying and creative marketing services
- Approach to onboarding and account management, including experience working and coordinating with multiple contacts within client organizations.

2. Relevant Experience

Please provide an overview of your company’s experience in the following areas, referencing prior client work as possible.

- Experience and approach to developing campaign media buying strategies to reach business and consumer audiences
- Experience executing campaign media buys through contracts with individual media service providers on behalf of a client
- Experience and approach to providing reporting on media buying budget and effectiveness
- Experience in multicultural or culturally specific marketing, communications and media buying, including experience with in-language campaigns for non-English speaking or bilingual audiences
- Experience working in rural markets or developing marketing materials and strategies for rural audiences
- Experience and approach to developing creative marketing materials, such as digital and traditional campaign creative, collateral and customer guides
- Any relevant industry experience (environmental, sustainability, energy efficiency, renewable energy, behavior change, nonprofit, utility and public sector)

3. Supplier Diversity

Please describe your approach to diversity, equity and inclusion, including:

- Experience in integrating diversity, equity, and inclusion internally in your firm, both in staffing and in contracting for services. **Note whether your agency is COBID certified and/or whether your firm is woman- or minority-owned**
- Efforts and experience in teaming with minority- and women-owned firms for delivering services like those described in this RFQ
- Approach to ensuring representation in the design and execution of multicultural strategies, including experience in transcending campaigns or marketing materials for culturally specific audiences
- If the respondent is not COBID-listed and/or woman- or minority-owned, the following is also required:
 - Description of work in the scope that will be subcontracted to a COBID-listed and/or woman- or minority-owned firm(s), including what percentage of the total scope of work the subcontractor(s) will be responsible for. A minimum of 20% of the contract budget is required to be allocated to COBID-listed and/or woman-or-minority-owned firm(s) per Energy Trust's [supplier diversity program](#).
 - The name and primary contact information for the subcontractor(s) or, if the subcontractor(s) are not known by the due date of this proposal, a stated commitment to and plan to identify the subcontractor(s) during contracting and no later than the start of work on January 1, 2023

4. Team Qualifications

Describe the experience of individuals who will comprise the respondent's proposed team and any subcontractors, including names, titles, amount of time with the company, qualifications and hourly rate.

5. Budget and Rates

- A pricing proposal, by time and materials or with alternative pricing, such as a retainer arrangement.

6. Work Samples and References (excluded from page limit)

- Contact information (company/individual name, title, phone number, email and address) for three professional references regarding your relevant experience
- Three to five examples of prior work, including at least one targeted to low- and moderate-income customers, communities of color or rural communities and at least one that was transcended in Spanish

7. Other Required Attachments (excluded from page limit)

- Disclosure of any direct or indirect, actual or potential conflicts of interest with Energy Trust
- A signed and completed Representations and Signature page (Appendix A)

Interviews

Energy Trust may request that one or more respondents participate in a remote (virtual) interview to discuss their submission with the RFQ selection team.

Energy Trust will not provide compensation for any costs related to presentations or demonstrations made in response to this RFQ. Energy Trust will schedule any presentations at mutually convenient times for Energy Trust and the respondents(s) within the defined period. Respondents should prepare for detailed questions about their company, team, relevant experience and proposed approach to the scope of services.

6. Contractor Selection Criteria

Proposal selection will be the sole responsibility of Energy Trust and will be undertaken at the sole discretion of Energy Trust. Proposals may be eliminated from consideration at Energy Trust's sole discretion for any reason, including but not limited to:

- The proposal is substantially incomplete or exceeds page limits
- The proposal is not responsive to the objectives and requirements of this RFQ
- There is evidence of financial instability of the firm or team
- The proposal is inconsistent with Energy Trust policies or requirements
- Supplier diversity requirements are not met
- A conflict of interest exists

The RFQ selection team will use the respondents' written proposals and interviews to evaluate responses. The criteria used in the team's evaluation are below and some elements will be given greater weight than others:

- Completeness of proposal and content addressing the proposal requirements
- Demonstration of executing Scope of Services with evidence of success for consumer and business audiences
- Relevant experience working with nonprofits and public agencies seeking to engage communities of color, low-income and rural audiences
- Relevant experience of individuals on the proposed team
- Ability to come up to speed quickly on Energy Trust and develop and maintain working knowledge of program and organizational objectives and challenges
- Reasonable cost
- Status as a COBID-listed and/or woman- or minority-owned firm OR percentage of contract scope and value dedicated to a COBID-listed and/or woman- or minority-owned subcontractor²
- Consultant's office location; all responses are welcome regardless of geography and all responses that demonstrate qualifications outlined in the RFQ will have a fair opportunity to compete. It is Energy Trust policy that 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.
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² Energy Trust's Supplier Diversity Program requires large contracts to include a subcontracting plan that provides for at least 20% of contract scope and value with COBID certified subcontracted firms unless the respondent is itself a COVID certified firm.

7. Resulting Contract

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.

Contract pricing and budget may be structured as time and materials with a not-to-exceed contract cap or with alternative pricing, such as a retainer arrangement. 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.

8. RFQ Governing Provisions

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

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.

Resulting Contract

Any final agreement on tasks to be performed as a result of this RFQ would be set forth in a written contract between Energy Trust and the selected firm. No commitment, obligation, or legal relationship exists between Energy Trust and any respondent until such written agreement is fully executed. It is anticipated that the term of any final, written agreement entered into as a

result of this RFQ would be through 2024. Such term could be extended, but only in writing and upon agreement of all parties.

Confidentiality

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 RFQ to any third party.

Ownership of Responses

All materials submitted in response to this RFQ shall become the property of Energy Trust and will not be returned to the respondent.

No Verbal Addendums

Any clarification or interpretation of the RFQ 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 RFQ. Any addendum to this RFQ will be in written form.

Respondent Costs

Each response prepared in response to this RFQ 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 of Energy Trust's agents, employees or contractors, with respect to any matter arising out of any process associated with this RFQ.

Energy Trust Rights Reserved

Energy Trust reserves the right, in its sole discretion, to reject any or all submissions 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 RFQ, Energy Trust may in its sole discretion do any one or more of the following:

- Disqualify responses that do not meet the requirements
- Issue additional subsequent solicitations for information or proposals, including withdrawing this RFQ at any time and/or issuing a new RFQ 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 RFQ process at any time

Conflict of Interest

Respondent shall disclose in its submitted response all direct or indirect actual or potential conflicts of interest it or any of its personnel may have with Energy Trust. A “direct or indirect conflict” is defined as any situation in which an individual has 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.

Additional Information

Energy Trust may request additional information.

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