

# **Energy Trust of Oregon** **Creative Services Contractor** **Request for Proposals (RFP)**

**RFP Submission Deadline:**  
**August 8, 2024, 5:00 p.m. (PDT)**

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## 1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust) is issuing a Request for Proposals (RFP) for a Creative Services contractor. The selected contractor will work with Energy Trust to provide a full range of print and digital creative services in support of annual brand level, B2B and B2C awareness campaigns and select product campaigns, with the goal of driving program participation and building brand awareness with customers and stakeholders. In addition, the selected contractor will also provide support to the Energy Trust marketing team in developing key operational assets such as an updated Brand Book with stylesheets for audience specific usage and a media guidebook for use in media buying. The full scope of services required is detailed in **Section 3** below.

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.

There is no singular incumbent firm providing the marketing creative services described in this RFP, but Energy Trust has used a variety of creative service vendors to provide campaign support in the past. Energy Trust will examine all proposals carefully and with equal consideration.

### Key Dates

Responses must be submitted electronically, in PDF format, by August 8, 2024, 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 creative work samples.

RFP posted	July 18, 2024
Proposal due	August 8, 2024, 5:00pm (PDT)
Notify of interviews	Week of August 19, 2024
Interviews	Week of August 26 or September 2 2024
Inform selected contractor	Week of September 9, 2024
Scope/contracting begins	Week of September 16, 2024
Contracting complete/work begins	January 1, 2025

### 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 \$7.2 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 is available on our website at [www.energytrust.org/about](http://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 our [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.<sup>1</sup>

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](http://www.energytrust.org/about).

## 2. Marketing at Energy Trust

Creative services are a critical aspect of brand and program integrated marketing campaigns intended to raise awareness of Energy Trust among communities, customers, and stakeholders and to drive participation in our programs and services. In these campaigns, we leverage a full array of traditional and digital advertising as well as targeted outreach activities to reach the following audiences with a focus on priority customers (e.g. communities of color, Spanish-speaking customers, customers with low incomes and rural communities):

- Residential customers eligible for energy efficiency and solar programs (including renters and homeowners in manufactured homes, apartments, condos and single-family homes)
- Business customers eligible for energy efficiency and solar programs (including our Multifamily, Existing Buildings, Industrial and Agriculture and Business Lighting programs)
- Stakeholders (including peer organizations, community-based organizations, government agencies and elected officials)

A key focus of our marketing activities is to deliver messaging, strategies and creative materials that advance diversity, equity, and inclusion objectives and to reach customers who we have not

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<sup>1</sup> 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.

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.

Energy Trust creates an annual 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 marketing creative strategy and development in 2025.

The selected contractor will work together with two groups at Energy Trust to plan, develop and implement marketing campaign creative 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 focuses on product and service marketing across our portfolio of Business, Industry & Agriculture, Residential and Renewable programs. The two teams work in close collaboration to align brand and product marketing. In addition to collaborating with the brand team on sector-level awareness campaigns and running internal strategic planning for certain programs, the Program Marketing Team also works with a variety of consulting firms on the execution of product-specific campaigns for consumer and business offers

### 3. Scope of Services

Energy Trust seeks a contractor that can quickly and cost-effectively get up to speed on understand our organization, programs, as well as the communities we serve, and our role in the energy industry. The selected contractor will have expertise in developing and executing original creative concepts for brand awareness campaigns for use in to be used in advertising across the statewide, including in rural areas, communities of color, low-income customers communities and among Spanish-speaking customers. The primary objective is to raise awareness of the services sought is to raise awareness of Energy Trust's value and offerings and motivate customers to act take action.

All activities will align with Energy Trust's brand strategy, brand marketing plan, organizational public relations strategy and program marketing plans and campaigns. The contractor will also collaborate and coordinate with other external contractors or agencies as needed to ensure creative concepts are consistent align across the organization and programs.

The 2025 scope of work will include:

#### Initial Onboarding and Discovery

1. **Review existing creative campaigns currently running in 2025 and:**
  - a. Identify areas where updates or improvements are needed to enhance effectiveness in 2025.
  - b. Provide detailed recommendations for these updates, including changes to visuals, messaging, and targeting strategies for 2025.
  - c. Ensure all proposed updates align with Energy Trust's brand strategy and campaign goals.

2. **Intake Sessions with Key Marketing Staff** to validate and understand organizational needs for integrated marketing activities.

## 2026 Integrated Awareness Campaign Strategy and Creative

1. **Campaign Strategy & Creative Concept Development** for three integrated awareness campaigns targeted to a general brand audience, B2C and B2B. The brand awareness campaign is considered an “umbrella campaign” across all programs and the commercial and consumer campaigns go a step deeper, with different and distinct voices. These campaigns will be in market starting in 2026. Contractor will utilize existing market research and marketing plans to understand target audience preferences and behaviors, develop a comprehensive creative brief outlining campaign objectives, key messages, and branding guidelines and deliver a final campaign concept that aligns with the organization’s goals.
2. **Graphic Design & Visual Assets** for the three awareness campaigns, including digital ads (banner, display, retargeting), social media graphics, print ads and other collateral as identified (posters, flyers, banners, etc) in both English and Spanish.
3. **Video & Motion Graphics**, including a series of short videos (e.g., 30-second to 1-minute clips) for social media and online use and motion graphics for use in videos and digital ads, with accessibility for both English and Spanish language audiences.
4. **Copywriting** compelling copy for various campaign assets including print and digital ads, social media posts, video scripts, email campaigns and website content.
5. **Website & Landing Page Optimization** including a review of existing landing pages with consideration for SEO and conversions, recommendations for and execution of updates to copy and imagery in coordination with the Energy Trust web development team.

## Creative Development for Other Marketing Strategies

1. **Develop Creative Assets as Needed** for internally led sector- or product-specific campaigns for our Renewables and Business Programs, as well as a potential campaign to support Workforce Development.
  - a. **Renewables:**
    - i. Design visuals and messaging to increase awareness of and promote Energy Trust’s suite of solar-related products and services.
    - ii. Creating digital and print assets that resonate with residential and commercial audiences.
  - b. **Business Lighting:**
    - i. Develop marketing collateral that promotes energy-efficient lighting solutions for businesses
    - ii. Craft compelling content for various channels to engage business owners and decision-makers.
  - c. **Workforce Development:**
    - i. Design a voice / tone for recruitment materials such as brochures, posters, and videos to attract talent to energy-related career opportunities, with the understanding these would be used for adult and young-adult audiences.

- ii. Design campaign visuals that emphasize career growth and impact of workforce development programs.
- d. **Production Efficiency**
  - i. Develop creative assets such as print and digital ads, fact sheets, case studies, blog posts and more to support our industrial and agricultural marketing plans.

## Guidance Documentation

1. **Update the Energy Trust Brand Book** with specific guidance on how to actualize the brand for program-specific audiences such as Residential, Business, Industrial and Renewables. Include recommendations for updates to visual style that reflects new creative direction and allows for more engaging creative treatments, as well as key factors to consider when exploring new creative approaches.
2. **Create a Media Buying Toolkit** for use by Energy Trust's marketing contractors in developing media buying strategies, ensuring the highest and best use of creative assets and campaign strategy.
3. **Create an annual marketing campaign calendar template** to align all marketing and brand teams on campaign launch dates and themes, ensuring a coordinated and cohesive approach throughout the year.
4. **Update voice and tone for each program marketing team.** How does Residential go to market differently than Business but still on brand? Create "toolkits" for each program marketing team.

## 4. Budget

The 2025 budget for the scope of services described in this RFP is roughly \$1 million and budget for 2026 will be negotiated based on needs identified during 2025.

## 5. Submission Requirements and Guidelines

Responses to this RFP 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](mailto:sloan.schang@energytrust.org). The electronic copy can be submitted as a PDF or secure Word file. Please clearly indicate "RFP Response" in the subject line of the email submission. Questions about the RFP may only be submitted in writing to [sloan.schang@energytrust.org](mailto:sloan.schang@energytrust.org).

## Signature Page

In order for Energy Trust to consider responses, respondents must submit the Signature page attached to this RFP 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 RFP 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 creative services
- General description of creative 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 creative strategies and assets to reach business and consumer audiences
- Experience in multicultural or culturally specific marketing, communications and, including experience with in-language campaigns for non-English speaking or bilingual audiences
- Experience working in rural markets
- 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 RFP
- Approach to ensuring representation in the design and execution of multicultural strategies
- If the respondent is not COBID-certified 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-certified 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, 2025



#### **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 transcreated 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 RFP selection team.

Energy Trust will not provide compensation for any costs related to presentations or demonstrations made in response to this RFP. 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 RFP
- 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 RFP 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 the 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-certified and/or woman- or minority-owned firm OR percentage of contract scope and value dedicated to a COBID-certified and/or woman- or minority-owned subcontractor<sup>2</sup>
- Consultant's office location; all responses are welcome regardless of geography and all responses that demonstrate qualifications outlined in the RFP 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.

## 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

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<sup>2</sup> 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.

negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

## 8. 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, 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 RFP 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 RFP would be through 2026. 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 RFP to any third party.

### Ownership of Responses

All materials submitted in response to this RFP shall become the property of Energy Trust and will 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 of Energy Trust's 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 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 RFP, 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 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

## 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: RFP 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 RFP.
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: