

Energy Trust of Oregon

Request for Proposals:

Indoor Agriculture Dehumidifiers

Market Research

RFP Issued: **August 9, 2024**
Intent to Bid Due: **August 23, 2024**
Proposals Due: **September 12, 2024**

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About Energy Trust

Energy Trust is a nonprofit organization selected and overseen by the Oregon Public Utility Commission to help utility customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista lower energy costs, increase energy savings and generate renewable energy. Since 2002, our cash incentives, technical support, education, and strategic partnerships have helped customers save billions of dollars on their energy bills and achieve their energy goals.

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.

Some of Energy Trust's requirements in this RFP and in any subsequent negotiating and/or contracting phases are driven by governing law, the provisions of our grant agreement with the OPUC (the OPUC Grant Agreement) and our funding agreements with each utility.

Introduction

Energy Trust of Oregon is seeking proposals to conduct market research to inform updates to its indoor agriculture dehumidifier measures. In 2003, Energy Trust established the Production Efficiency (PE) program to promote and implement energy efficiency measures within Oregon's industrial and agricultural sectors. The program supports both new and existing businesses and facilities by providing technical services and financial incentives. The financial initiatives aim to induce customers to select higher efficiency options for a wide range of industrial and agricultural equipment, systems, and processes.

Among its targeted offerings, the PE program offers financial incentives for the installation of efficient portable or standalone dehumidifier units specifically for indoor agriculture facilities, excluding dehumidifiers that are integrated within built-up HVAC systems or installed in greenhouses. The dehumidifier offering is a prescriptive measure, managed by the PE Program Management Contractor (PMC), Energy 350, through the Standard Industrial track.

Since it began 2021, the dehumidifier offering has experienced a significant uptick in customer participation, as shown in Table 1 below. From 2021 through July 2024, Energy Trust has estimated, based on the current program assumptions documented in the Measure Approval Document (MAD), that these dehumidifier projects have achieved approximately 34 million kWh of savings.

Table 1. Projects, sites, and savings from new construction and retrofit dehumidifier installs, 2021 through July 2024.

Year	Install Scenario	Projects	Sites	Reportable kWh Savings
2021	New construction	8	8	435,808
	Retrofit	20	19	1,387,062
2022	New construction	16	14	1,434,797
	Retrofit	67	50	5,873,758

2023	New construction	20	19	1,987,423
	Retrofit	121	92	14,199,480
2024¹	New construction	10	10	843,158
	Retrofit	62	53	8,060,819
TOTAL²	All	292	186	34,222,304

For more background on Energy Trust’s Production Efficiency program, see “Industrial and agriculture sector highlights” sections in Energy Trust’s Annual Reports and previous program impact and process evaluations on Energy Trust’s website at: <https://www.energytrust.org/about/our-impact/reports-financials/>.

Research Objectives

Energy Trust performs market research to inform updates to program offerings. This research aims to help Energy Trust understand the market baseline and equipment replacement trends for indoor agriculture dehumidifiers. This market research seeks to address the following research objectives:

Establishing Indoor Agriculture Dehumidifiers Market Baseline:

- What is the mix of dehumidifiers being purchased by growers who have not participated in Energy Trust’s dehumidifier offering?
- What are the makes, models, sizes, and efficiencies of the equipment being bought?
- Where and how are these units being installed? What kind of grow space are they operating in, and are they adding capacity or replacing old equipment?

Understanding Equipment Replacement and Installation Practices

- How do program participants and nonparticipants decide which units they will purchase? How, if at all, do these decisions differ by the size of the grow room they are operating in?
- What equipment is being replaced by units incentivized through the program, and what do customers do with the old units after they are replaced?
- How are new, incentivized units installed? Are they adding capacity or replacing old equipment? What kind of grow space are the new units being installed in?
- How do participants and nonparticipants decide when to upgrade or replace their dehumidification system? Are there other upgrades or changes they tend to make at the same time?

Understanding Market Dynamics and Supply Chain

- Where, and through what channels, do participants and non-participants purchase this kind of equipment?

¹ 2024 savings include projects completed as of 7/30/2024.

² Totals represent unique projects and sites. Site total is less than the sum of each year’s sites due to repeat participants. Project total is less than the sum of each year’s projects due to some projects including both retrofit measures and new construction or added capacity measures.

- Do manufacturers have plans to introduce new types, sizes, capacities, or efficiencies of this equipment in the coming years?

Tasks

Task 1. Study Kick-off Meeting

The selected research team will organize and host a virtual kick-off meeting with Energy Trust Program and PMC staff, the Energy Trust Evaluation Project Manager, and Energy Trust engineering staff. This meeting will serve as the foundation for establishing key points of contact, facilitating a detailed discussion on the program specifics, presenting the proposed research framework and schedule, and aligning on data requests and research methodologies. The research team will actively seek input from Energy Trust during this meeting to refine and finalize the research plan based on the feedback and discussions.

Deliverables

- Kick-off Meeting Agenda and Meeting Notes

Task 2. Review Program Data, Related Literature, and Relevant Market and Regulatory Data

The selected research team will review existing resources to ensure a comprehensive understanding of program activity and structure, as well as the indoor agriculture market in Oregon more broadly. This review will include the following:

- Dehumidifier Program Data Analysis: The selected evaluator will review dehumidifier participation data, and will become familiar with additional information contained in project files such as make, model, and size of equipment purchased by program participants. This will allow the research team to become familiar with what information is available to them, and what the potential pool of program participants is for the present study.
- Oregon Liquor and Cannabis Commission (OLCC) Data Review: Utilize data from OLCC to assess license categories and identify potential segmentation for the study, and to identify the general pool of all licensed cannabis growers in Oregon. This will allow the research team to begin identifying the potential pool of non-participants.
- Other Indoor Agriculture Program Data Analysis: Review participant data for other Energy Trust indoor agriculture offerings to understand overlap with the dehumidifier participant pool.
- Literature and Regulatory Review: Examine related literature and relevant regulatory standards that impact the use and efficiency standards of dehumidifiers.

Energy Trust will provide the selected evaluator with a dataset of dehumidifier measure activity from 2021 through the present, along with other program data and documentation for review in this task. This task should inform the identification of participants, non-participants, manufacturers, and participant vendors who could be surveyed or interviewed as part of this study. These will directly inform the development of the workplan.

Task 3. Develop Work Plan Including Sampling Plan

The selected research team will develop a detailed work plan. The work plan will include:

- Evaluation goals and research questions
- Evaluation methodologies
- Sampling plans for surveys with participants and non-participants, and interviews with manufacturers and vendors (see below, and Tasks 4 and 5 for further detail)
- Recruitment plans (see Tasks 4 and 5 for further detail)
- Schedule of tasks and deliverables

The draft work plan will be presented to the Energy Trust Evaluation project manager for review and approval before finalizing, and the research team will incorporate feedback into all components of the work plan, as needed.

Proposals should detail respondent's approach to analyzing available non-participant pool for surveys, and suggest other options that would be considered if the pool of Oregon non-participant indoor agriculture growers is insufficient to understand purchasing outside of the program. Proposals should also include an outline of proposed sample sizes and expected precision for participant surveys, as well as an estimated sample size for vendor interviews.

Deliverables

- Draft and final detailed work plan

Task 4. Conduct Participant and Non-Participant Surveys

The selected research team will conduct surveys of participants and non-participants. These surveys will help address two primary goals of the study: investigating purchasing practices and dehumidifier units purchased outside of the program, and understanding participant equipment replacement. Surveys will explore the types and efficiencies of portable dehumidifiers that non-participant growers have or would purchase in the absence of the program. Additionally, surveys will collect detailed information on the types of dehumidifiers replaced when participants purchase new dehumidifiers through the program, and learn the fate of these units, delving into the decision-making process for equipment replacement. For both participants and non-participants, surveys will ask about reasons for purchasing new dehumidification equipment. The survey should also collect general information on facility characteristics, including horticultural lighting, heating and cooling equipment.

The selected evaluator will develop a single survey guide for both participants and non-participants, with skip logic to avoid collecting redundant or irrelevant information (for example, there should not be a need to collect information on dehumidifier units purchased by participants unless they have since purchased dehumidifiers outside of the program, as this information is contained in individual project files). The survey instrument will be designed to take roughly 15 minutes to complete. The draft survey guide will be provided to the Energy Trust Evaluation Project Manager for review and comment before finalizing.

The survey sampling plan should be designed to achieve 10% precision at a 90% confidence level for participants, with 15% precision at a 90% confidence level for new and retrofit cases separately. The non-participant survey recruitment plan will be designed to achieve 15% precision at a 90% confidence level.

The research team will evaluate the extent of the program's reach among eligible participants, i.e., licensed commercial growers. A detailed analysis of population and program participant data will be performed to understand whether there are sufficient non-participants left who are

representative of typical market behavior outside of the program. If the program has already captured a significant portion of the potential market, the remaining non-participant pool may not be large enough or representative enough to determine what typically would have happened in the absence of the program. In this case the research team will develop methods to mitigate any bias due to an insufficient non-participant pool, or consider looking to other comparable markets to include in the non-participant survey pool.

The selected evaluator will employ email and phone recruitment to reach participants and non-participants. Energy Trust Production Efficiency program or PMC staff may assist with recruitment by providing advance notice to past participants, as well as warm introductions between the evaluator and past participants. All survey respondents will be provided with \$50 incentives for their time. Incentives must be clearly provided by the selected evaluator, not Energy Trust, and the evaluator will be solely responsible for any required tax reporting.

Proposals should outline respondent's recruitment plan for participants and non-participants; tailoring of these plans may be helpful to leverage existing program relationships with participants and to give additional attention to non-participant recruitment where those relationships are not present.

Deliverables

- Draft and final versions of data collection tools
- Draft and final recruitment materials, including template emails for Energy Trust program or PMC staff to use for introductions
- Section(s) in report summarizing the methods and findings of surveys and interviews

Task 5. Conduct Interviews with Manufacturers and Vendors

The research team will conduct interviews with manufacturers, vendors and retailers who have or will sell products or services relating to dehumidification in the indoor agriculture market.

Semi-structured interviews with manufacturers are to be used to complement participant and non-participant surveys by providing broader insights into market dynamics, sales trends, and challenges faced by dehumidifier producers. These interviews will include manufacturers of both incentivized and non-incentivized equipment in the market. For manufacturers of equipment incentivized through the program, the Energy Trust Production Efficiency PMC can provide contact information for a manufacturer representative and can assist with warm introductions between these representatives and the research team. It is anticipated that at least three and not more than eight manufacturers will be interviewed for this task.

Interviews with vendors, including those who have participated in the program as well as those who have sold dehumidifiers to non-participants, are to be used to further explore their roles in the supply chain, as well as gain insights into sales trends, and what non-program qualifying dehumidifiers are commonly sold in Oregon. As part of this, the selected evaluator will request sales data from vendors where available; when sales data is unavailable, the evaluator will include questions to gain insight into the vendor's sales.

The list of vendors to include in these interviews will come from program data and participant and non-participant surveys, to ensure inclusion of vendors who sell to program participants as well as to non-participants. About 40 different vendors have sold dehumidifiers incentivized through the program in the last four years. The recruitment plan for vendors will aim to reach

a broad set of vendors that represent the dehumidifiers market for participants and non-participants.

The research team will submit draft interview guides to the Energy Trust project manager and will incorporate all feedback into the final products before finalizing. These interviews are anticipated to take roughly 30 to 45 minutes. All vendors and manufacturer representatives will be provided with a \$75 incentive for their time. Incentives must be clearly provided by the selected evaluator, not Energy Trust, and the evaluator will be solely responsible for any required tax reporting.

Proposals should describe respondents' approach to building a list of potential vendors to interview, combining program data with survey responses from participants and non-participants. Proposals should also describe respondents' recruitment approach for these market actor interviews.

Deliverables

- Draft and final interview guides
- Section(s) in report outlining methods and findings of interviews

Task 6. Analysis

The selected evaluator will use sales data from vendors along with survey results from non-participants to analyze the types and efficiencies of portable dehumidifiers that are likely to be purchased absent of the program. The selected evaluator will also report findings related to participant and non-participant facility type and size, facility configuration (lighting type, cooling/heating type), equipment type, capacity and efficiency. The research team will also analyze participant survey data to illuminate the decision-making process for dehumidifier replacement. This includes exploring the reasons behind the replacement of old units, the types and efficiency of replaced units, and the fate of the replaced units.

Deliverables

- Section(s) in report outlining analysis findings

Task 7. Reporting

The selected research team will produce a final report after all tasks are completed which summarizes the key research methods, findings, and conclusions. Key findings will be highlighted with compelling tables, charts, and graphics. The use of tables and graphs is also required for material that does not lend itself well to narrative form. The selected evaluator will draw conclusions and make recommendations related to the research goals and objectives based on the findings. The report will include, at a minimum, the following sections:

- Executive summary
- Introduction, including description of the purpose of the study
- Summary of methods, including data sources used
- Results, including charts and text highlighting key findings
- Conclusions relating to the findings and research goals
- Appendices containing survey instruments and interview guides
- Appendices containing detailed tables of results or each survey, crosstabulations, or additional analyses that may be of interest but are not of key importance

A draft market research report will be reviewed and commented on by Energy Trust staff, PMC staff, third-party reviewers, and other parties deemed appropriate by Energy Trust. Based upon these comments, the selected research team will make revisions and deliver a final version of the report within two weeks of receiving feedback. Achieving an acceptable final report may take more than one iteration between the research team and Energy Trust. Where applicable, data, phone conversations, non-confidential sources, publications, and other media used in the report must be referenced and cited. It is anticipated that any respondents or sources can be promised confidentiality in terms of attribution of responses. Findings and conclusions will be based on the information collected by the selected evaluator and referenced in the report.

Deliverables

- Draft and final written report

Task 8. Project Management

The evaluator will manage all aspects of the project and ensure that it stays on schedule and within budget. They will host regular virtual meetings throughout the evaluation project to keep the Energy Trust Evaluation Project Manager informed of progress, upcoming research activities, and requests for assistance or data. In addition to these regular meetings, the evaluator will provide frequent project updates by email, especially if any issues arise. The evaluator will proactively advise on ways to maximize the quality of the evaluation and interview response rates prior to, during, and post data collection.

The evaluator will be required to submit monthly status reports presenting:

1. Current and total amounts invoiced to date compared to the approved budget
2. A summary of accomplishments during the previous month
3. Current month's activities and plans
4. Variances in the project schedule or budget, including any necessary explanations
5. If applicable, any issues or concerns to be addressed, with proposed solutions
6. Current and total amounts invoiced to date for COBID-certified subcontractors relative to total contract spending (if applicable)

These reports are due by the 10th of every month and must accompany the invoice, starting the first month after work begins.

Deliverables

- Regular check-in meetings with Energy Trust Evaluation Project Manager
- Frequent survey updates during fielding
- Monthly status reports

Schedule

Energy Trust anticipates that a contract will be awarded in October 2024 and that the project will kick off immediately thereafter. Preliminary results will be ready to review in March of 2025, and a draft report will be delivered in April 2025. A final report will be delivered within two weeks of having received all comments and edits on the submitted draft. The evaluator will be required to provide a monthly evaluation update to Energy Trust by the 10th of every month.

Budget

It is anticipated that the budget for the evaluation work as described in this RFP will be approximately \$110,000; however, Energy Trust reserves the right to revise budget assumptions at any time.

Proposal Requirements

Proposals must be clear, complete and concise. Pages must be numbered, sections must be clearly titled, and fonts must not be smaller than 11 point. Respondent's proposal must contain the following elements; failure to include any required elements may result in the rejection of respondent's proposal. Please note that the 25-page limit for the proposal does not include the supplemental information requested – work product examples, resumes of key staff and subcontractor team members, conflict of interest disclosure, insurance coverage information, and representations page. These should be included in attached appendices.

1. Proposal Information

Firm qualifications.

Proposals should provide an overview of the lead firm and any subcontractors. We encourage respondents to create a team of firms with specialized expertise to fill different project roles where applicable. Proposals should describe the respondent team's qualifications and experience doing similar work and identify specific aspects of the study where the respondent team's experience will be particularly relevant or important. **Not to exceed five (5) pages.**

Staffing and subcontracting plan.

Describe the project team structure, role of each key team member, subcontractor roles, COBID numbers for COBID certified subcontractors (see *Supplier diversity requirements section below*) and the management plan. **Not to exceed two (2) pages.**

Technical proposal:

A project proposal for the process evaluation, including proposed approach to the specific tasks identified in the "Tasks" section above as well as the firm's proposed approach to the evaluation overall, and a management plan, **not to exceed ten (10) pages.**

Supplier diversity requirements:

Proposals should indicate if respondent's firm or subcontractors are certified with the Certification Office for Business Inclusion and Diversity (COBID) of Oregon or US Small Business Administration (SBA) as one or more of the following certifications that qualify under Energy Trust's Supplier Diversity Program (SDP).

Qualifying COBID certifications:

- Minority Business Enterprise
- Women Business Enterprise
- Veteran Business Enterprise
- Service-Disabled Veteran Business Enterprise

- Emerging Small Business,

Qualifying SBA certifications:

- Small Disadvantaged Business
- Women Owned Small Business
- Economically Disadvantaged Women Owned Small Business
- Business Development Program (8a)
- Veteran Owned Small Business
- Service-Disabled Veteran Owned Small Business
- Historically Underutilized Business Zone Certification (HUBZone)

It is not required for a minimum value of any resulting contract to be directed towards SDP qualifying firms. However, Energy Trust still encourages interested firms to create teams that include SDP qualifying firms. As such, proposals which direct at least 15% of the value of a resulting contract may receive up to a 5% bonus during scoring. Any teaming should be reflected in the staffing and subcontracting plan and budget proposal. **Not to exceed one (1) page.**

Proposed schedule of deliverables:

Provide a schedule of major activities and deliverables listed in the Tasks section above, with approximate dates. The schedule should assume that a project kick-off meeting will be scheduled within three weeks of awarding the contract. Energy Trust anticipates launching this project in October 2024. The draft report should be delivered in April 2025. A final report will be delivered within two weeks of having received all comments and edits on the submitted draft. These schedule assumptions may be reassessed once the project begins. **Not to exceed two (2) pages.**

Detailed budget proposal:

A detailed budget proposal broken out by task and by individual performing the work. Key staff should be identified by name, with billing rates for each. Assume that billing will be on a time and materials basis, up to a “not-to-exceed” cap. Proposals should describe the underlying budget assumptions and any drivers of cost that can be modified without compromising the integrity of the evaluation.

It is anticipated that the budget for the scope described in this RFP will be approximately \$110,000; however, Energy Trust reserves the right to revise its budget assumptions at any time. We ask bidders to propose as competitive a budget for the project as they can, while being realistic about the scope that they can complete within that budget. If the proposed budget will exceed the \$110,000 threshold listed here, we will consider it, but ask that bidders provide a rationale for why it is necessary. In addition, we ask bidders proposing to exceed the budget threshold listed here to provide alternative budget scenarios where they could stay within the budget by making certain trade-offs – either by dropping tasks, reducing complexity in places, or reducing sample sizes and precision for the evaluation.

Proposals should summarize the budget in a table, breaking out the estimated hours and costs by task and staff member. Please use the following budget template. Staff and subcontractors listed in the budget should be identified by name, with billing rates for each. **Not to exceed two (2) pages.**

Budget Template

Staff Name	Firm	Hourly Rate	Hours Per Task			Total Hours	Total Cost
			Task 1	Task 2	Task...		
Staff Member 1							
Staff Member 2							
Staff Member...							
Subcontractor 1							
Subcontractor...							
Total Hours Per Task							
Direct Costs							
Total Cost Per Task							

Diversity, equity, and inclusion (DEI) experience:

Proposals should describe respondent’s efforts and experiences in integrating diversity, equity, and inclusion into their business operations, both internally and externally, and their experience conducting culturally responsive research and evaluation work. Energy Trust seeks to contract with organizations that share its commitment to building a diverse, equitable, and inclusive workplace and business environment, and that apply a diversity and equity perspective to their work. Respondents must provide responses to each of the questions listed in **Appendix B. Not to exceed two (2) pages.**

Data security and confidentiality:

Proposals should provide any data security certifications (e.g., ISO-27001 or SOC 2) that are held and maintained by the respondent **and** any subcontractors engaged in the project. Energy Trust recognizes that these certifications can present significant barriers for some firms. If your organization or subcontractor does not hold any relevant data security certifications, please provide a brief description of the **systems, policies, and procedures** used to ensure that Energy Trust provided data and data collected throughout the evaluation are kept secure and confidential during fielding, data transfers, storage, and analysis. **Not to exceed one (1) page.**

2. Work Product Example

Proposals should include **one past report** that showcases the respondent team’s work on a similar project, as well as their data presentation and reporting capabilities. If needed, the names of people and organizations may be redacted from the report to allow sharing it. The work product example should be included as either a link to a publicly available document or attached as an appendix to the proposal. **No page limit, but please keep materials to a minimum.**

3. Resumés

Proposals should include resumés of all key team members, from the lead firm and any subcontractors who will be performing work. These should be included in an appendix to the proposal. **No page limit.**

4. Insurance coverage information.

Energy Trust requires its contractors to maintain, at a minimum, workers compensation insurance, adequate commercial general liability insurance coverage, and automobile liability insurance. Cyber liability coverage may also be required. Provide a description of the insurance coverage provided by respondent for performing the impact evaluation work, including:

- Whether such coverage is on a “comprehensive” or “commercial” form
- Whether such coverage is on a “claims made” or “occurrence” basis
- All endorsements excluding coverage of any nature, if any
- All limits, including aggregate limits and the current remaining coverage amounts under those limits
- Effective date

This information should be provided in an appendix to the proposal. **No page limit.**

5. Conflict of Interest Disclosure

Respondent must disclose any direct or indirect, actual or potential conflicts of interest respondent or its subcontractors may have with Energy Trust in its proposal. A “direct or indirect conflict” is defined as any situation in which an individual or a member of their family or close business or personal acquaintance, is employed by Energy Trust or the OPUC, 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.

Respondent’s disclosure must specifically address any existing contracts between Energy Trust and the respondent, its staff, or any of its proposed subcontractors. If a potential conflict of interest is identified by the respondent, then the respondent should propose strategies to mitigate the conflict. If no conflict is identified by respondent, the respondent will explicitly provide such a statement in their RFP response. The determination of whether a conflict of interest exists and whether the proposed mitigation plan adequately addresses the conflict is left to the sole discretion of Energy Trust. This information should be provided in an appendix to the proposal. **No page limit.**

6. Representations and Signatures Page

Respondent’s proposal must contain the signature of a duly authorized officer or agent of the respondent company submitting the proposal. Respondent’s duly authorized officer or agent shall sign **Appendix A** certifying to the representations stated on **Appendix A**. The signed page should be provided as an appendix to the proposal.

Proposal Selection Criteria

Proposals will be judged on the criteria listed below. As noted above, failure to meet the proposal requirements may result in the rejection of a proposal without scoring.

- Technical proposal
- Qualifications of proposed team and staffing plan, including subcontractors (if applicable)

- Proposed budget
- Supplier Diversity Program eligibility (bonus to score only)
- Diversity, equity, and inclusion responses
- Data security and confidentiality
- Work product example

Schedule & Administration of Proposal Selection Process

RFP Schedule:

- | | |
|-----------------------------|---|
| • August 9, 2024 | RFP issued |
| • August 23, 2024 | Intent to bid due |
| • August 23, 2024 | Questions/request for additional information due |
| • August 28, 2024 | Clarifications/question responses posted to website |
| • September 12, 2024 | Proposals due |

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFP, as well as stating intent to bid on the project, must be submitted via email to the contact named below by **August 23, 2024**. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than **August 28, 2024**. Energy Trust cannot accommodate individual phone, mail, or fax inquiries about the RFP. All questions must be submitted via email.

Stating intent to bid does not obligate a respondent to submit a proposal. Only electronically submitted proposals (in PDF form) will be accepted; faxed or print proposals will not. A signed letter of transmittal (cover letter) is required and should be scanned and submitted along with the proposal. All proposals must be received by 5pm Pacific Time on **September 12, 2024**. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFP. Please submit proposal to:

Leila Shokat
Project Manager – Evaluation
Energy Trust of Oregon
Email: leila.shokat@energytrust.org

Revisions to RFP

If it becomes necessary to revise any part of this RFP, an addendum will be issued by Energy Trust and will be posted on the website. Respondents should contact Energy Trust if they find any inconsistencies or ambiguities to the RFP. Clarification given by Energy Trust may become an addendum to the RFP.

Withdrawal and Modification of Proposals

Respondents may withdraw their proposal and submit a revised proposal prior to the response deadline. After the response deadline, respondent-initiated changes will not be accepted. Respondents may withdraw their proposal from consideration at any time.

Proposal Evaluation and Notification for Negotiations

Energy Trust will review the proposals as received and may initiate negotiations with the leading respondent(s).

RFP GOVERNING PROVISIONS

All submitted proposals are subject to the following additional provisions.

Right to Accept or Reject Proposals, Multiple Awards

Energy Trust reserves the right to make multiple awards, reject any and all proposals and to waive any nonconformity in proposals received, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed in Energy Trust's best interest. Energy Trust may also choose to negotiate any of the details of proposals prior to contracting.

Confidentiality

Respondents shall clearly identify only those portions of their proposals 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. Energy Trust will not accept proposals or other documents that are marked to indicate the entire document is the confidential or proprietary information of the sender or that restricted handling is required. Normal business practices will be observed in handling proposal materials.

Ownership and Return of Proposals

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

No Verbal Addendums

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 add to, detract from, affect or modify the terms of the RFP, unless specifically included in a written addendum issued by Energy Trust.

Proposal Costs

Each proposal prepared in response to this RFP will be prepared at the sole cost and expense of the respondent and with the express understanding that there will be no claims whatsoever for reimbursement from Energy Trust.

Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust or its officers, directors, employees, or agents, 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 proposals 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:

- Determine which proposals are eligible for consideration in response to this RFP.
- Disqualify proposals that do not meet the requirements of this RFP, in the sole determination of Energy Trust.
- Negotiate with any respondent to amend any proposal.
- Select and negotiate and/or enter into agreements with respondent(s) who, in Energy Trust's sole judgment, are most responsive to the RFP and whose proposals best satisfy the interests of Energy Trust, in its sole discretion, and not necessarily on the basis of price alone or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFP at any time and/or issuing a new RFP that would supersede and replace this one.
- Vary any timetable or schedule, add or change any provisions discussed herein.
- Conduct any briefing session or further RFP process on any terms and conditions.
- Suspend or modify the RFP process at any time.
- Enter into relationships with more than one respondent.

Resulting Contract(s)

The selected respondent will be required to execute a written contract(s) with Energy Trust to perform the evaluation work. 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 contract has been executed by and between Energy Trust and the contractor. Time is of the essence with regard to this program evaluation, 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.

Appendix A: Representations and Signature page

I, the undersigned declare that;

1. I am an authorized agent of the respondent and have authority to submit this proposal on behalf of the respondent.
2. The information provided in this proposal is true and correct to the best of my knowledge.
3. I have read this Request for Proposals in its entirety and agree unconditionally to all of its conditions and requirements.
4. The respondent has not directly or indirectly induced or solicited any other respondent to submit a false or sham proposal.
5. The respondent has not solicited or induced any other person, firm, or corporation to refrain from proposing.
6. The respondent has not sought by collusion to obtain for itself any advantage over any other respondent or Energy Trust.
7. The respondent's proposal 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 understand and accept that the approval or rejection of respondent's request is within the sole discretion of Energy Trust and that there is no legal commitment until all due diligence has been performed and a properly authorized contract has been duly and properly executed.
9. I authorize the representatives of Energy Trust to investigate the business financial credit history of respondent, its affiliates, and all associated partners, principals and management and authorize the release of all said information.
10. I agree that I will report immediately in writing to Energy Trust any changes to the information contained herein at any time while I am under consideration for funding.

The information contained in this proposal 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 proposal 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: _____

Authorized Signature: _____

Name and Title: _____

(please print)

Appendix B – Diversity, Equity, and Inclusion Experience

Diversity, equity, and inclusion experience

1. Provide specific recent examples of activities, policies or investments that demonstrate how respondent promotes diversity, equity, and inclusion within respondent's company in the areas of
 - a. recruitment, hiring, retention and promotion;
 - b. training and professional development;
 - c. industry workforce development and support.

Cultural competence in evaluation

Culture shapes each step of the evaluation process—from the conceptualization of a study and its research questions; to decisions on what data to collect, how to collect it, and how to analyze it; to the interpretation and presentation of results. Culturally competent evaluation requires researchers to recognize their own cultural assumptions about a research project, continually consider cultural and contextual factors in their research design, and implement methodological adjustments to account for diverse research contexts.

2. Provide your plan to apply culturally competent research practices in this project.
3. Provide a specific example of your team's experience applying culturally competent research practices when working with diverse customer and stakeholder groups similar to this evaluation; how did the research project's goals, methods, or outcomes change?

