

REQUEST FOR QUALIFICATIONS (RFQ)

DEI Equity Planning

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon non-profit, 501(c)(3) corporation, has a need to create an Equity Plan in compliance with the Equity Objectives described in **Exhibit B** to the Agreement to Direct Funding to NonGovernment Entity entered between Energy Trust of Oregon and the Oregon Public Utilities Commission (OPUC) dated August 19, 2024.¹

Energy Trust seeks responses from firms with expertise in DEI consulting services generally and equity planning specifically. One contractor will be selected based on relevant experience, training and credentials, COBID or federal certification status, and pricing. Energy Trust strongly encourages the participation of all types of businesses, specifically minority-owned, woman-owned, veteran-owned and emerging small enterprises, in response to this solicitation.

The excerpt of **Exhibit B** to the OPUC Agreement is attached to this solicitation. Contractors shall review the requirements of Exhibit B before submitting relevant qualifications and experience.

Energy Trust Overview

Energy Trust is an independent nonprofit organization, selected and overseen by the Oregon Public Utility Commission (OPUC), that helps Oregon utility customers save on energy consumption with incentivized efficiency measures and independent generation of renewable power.

Energy Trust total investments in local energy projects that save energy and generate clean energy will save utility customers \$8.9 billion on their utility bills over the lifetime of those investments. Participating customers have already saved \$4.6 billion on their energy bills since 2002. The cumulative impact of our leadership has been a contributing factor in building a sustainable energy future. More information about Energy Trust's background, funding sources, strategic and action plans, policies, and programs are available on our website at www.energytrust.org/about.

RFQ Submissions:

Submissions in response to this RFQ will be accepted until January 24, 2025. Respondent submissions will be reviewed, and respondents will be contacted by Energy Trust within 30 days of Energy Trust's receipt of a complete submission as described below for further discussion.

To submit a response to this RFQ, please complete the fillable application at **Exhibit A** titled "**Submission Form**" below (once you click the yellow "Submit" button, the application will trigger an email to the point of contact). Alternatively, if you have technical problems with the submission form you may provide your responses to the form via email directly to **alicia.moore@energytrust.org (DEI Services Director)**, and the subject line of the emailed submission must clearly state: **RFQ Response – DEI Equity Planning**.

Verbal questions and discussions with Energy Trust staff about the RFQ cannot be accommodated. Any questions, requests for clarification and/or additional information regarding this RFQ must be submitted via email to the contact listed above on or before January 17, 2025. Questions and/or requests for clarification will be posted before the closing date of the RFQ and will be anonymized

¹ https://www.energytrust.org/wp-content/uploads/2024/08/3964_Energy-Trust_PUC-Agreement-2024_Executed.pdf

and posted so that all potential respondents receive the same information, and no respondent receives preferential treatment.

Other Terms:

A. 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 or revise 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.

B. Ownership of Responses

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

C. Confidentiality

Note that proprietary information, if any, must be minimized and SHALL BE CLEARLY MARKED. Respondents shall clearly identify those proprietary portions of their responses that they do not want revealed to third parties and label such portions as "Confidential Information." Except as required under Energy Trust policy, law or for regulatory purposes Energy Trust will maintain confidentiality of such information.

D. Respondent Expenses

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any respondent for any claims, whether for costs or damages incurred by the respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.

E. Independent Contractor Status

Selected contractor(s) will be independent contractors to Energy Trust and must be in a position to act as independent contractors.

F. Confidentiality

Contractor(s) may be required to use and maintain Energy Trust's confidential information and in accordance with all Energy Trust requirements in the protection and use of information.

Exhibit A: Submission Form

<https://www.energytrust.org/about/work-with-us/how-to-work-with-energy-trust/dei-equity-planning-rfq/>

EXHIBIT B

EQUITY OBJECTIVES

The Program Requirements and Energy Trust's operation shall be designed and implemented consistent with these Equity Objectives in this *Exhibit B*. The PUC expects program services delivered with the Funds to be developed in a manner that is responsive to the issues of diverse communities. Program services should be provided in a manner that is respectful of, and relevant to, the beliefs, practices, culture, and linguistic needs of diverse communities. To accomplish these objectives, the nongovernmental entity providing Program services under this Agreement must develop the knowledge and capacity to address equity issues at a structural, organizational, interpersonal, and individual level. The following are the PUC's equity objectives for Energy Trust, which are separate from and in addition to meeting and reporting on its performance under the equity metrics established by the PUC under ORS 757.747.

Expectations for Program Services

To the extent permitted by law, and as required by Applicable Law, Energy Trust shall:

- a) Work to build a workplace and staff culture and climate that promotes acceptance, inclusion, and respect of all individuals;
- b) Understand the communities served, in a non-static manner, including the communities' culture, values, norms, history, customs, and particular types of discrimination, marginalization, and exclusion they face in this country. Energy Trust shall apply that knowledge to services it provides under this Agreement in a responsive, non-limiting, and non-stereotyping manner;
- c) Whenever possible, interact with community members according to their preferred language and in a manner that is respectful of cultural norms; and
- d) Engage in continuous learning about their own biases, assumptions, and stereotypes that may limit their ability to be culturally responsive and to understand how these biases affect their work with communities served by Energy Trust.

To the extent permitted by law, Energy Trust shall:

- a) Ensure that applicants and employees are not subjected to unlawful discrimination in hiring, compensation, or the terms, conditions or privileges of employment because of race, color, religion, sex, sexual orientation, gender identity, national origin, ethnicity marital status, age, political affiliation, or disability; and
- b) Ensure that any subcontract, purchase, or other agreement used to carry out the Program Requirements and entered into after the effective date of this Agreement expressly

prohibits the performing entity from subjecting employees or applicants to discrimination in hiring, compensation or the terms, conditions or privileges of employment because of race, color, religion, sex, sexual orientation, gender identity, national origin, ethnicity, marital status, age, political affiliation, or disability or equivalent measures.

In addition, Energy Trust shall collaborate with the PUC to develop an Equity Plan that supports the Equity Objectives in this *Exhibit B* and to conduct an annual assessment that assesses how Energy Trust is achieving equitable results in the following areas:

- a) Engagement and collaboration with communities and community-based organizations;
- b) Empowering staff, customers and communities to be involved in Energy Trust planning processes, including strategic planning and multiyear planning;
- c) Enhancing workforce equity so that the identities of Energy Trust staff reflect the changing population;
- d) Engagement and collaboration with small and disadvantaged businesses to promote supplier diversity in Energy Trust contracting; and
- e) Enhancing workplace equity to build and improve an environment that promotes acceptance, inclusion and respect of all individuals.