

Request for Qualifications
Public Relations Services

Request for Qualifications released: June 13, 2011

Responses due: July 1, 2011

Contract period: August 1, 2011 – July 31, 2012

1. Introduction

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit corporation, is issuing a Request for Qualifications (RFQ) for a contractor or firm to provide public relations and media support for our residential programs. The successful contractor will provide public relations services designed to:

- increase positive media coverage of Energy Trust residential programs, offerings and services
- increase customer awareness of Energy Trust residential programs, offerings and services
- increase customer participation in Energy Trust residential programs, offerings and services.

It is Energy Trust's intention to solicit proposals from a wide range of multiple respondents. Energy Trust will examine all proposals carefully.

2. Background

About Energy Trust

Energy Trust is an independent nonprofit organization dedicated to helping Oregonians benefit from saving energy and generating renewable energy. The organization's services, cash incentives and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas save nearly \$800 million on energy bills. Our work helps keep energy costs as low as possible and builds a sustainable energy future. To learn more about Energy Trust please visit www.energytrust.org/about.

Energy Trust 5-Year Strategic Plan

Energy Trust's 5-year Strategic Plan, 2010-2014, outlines the following actions the organization will take to reach its goals:

1. Accelerate energy-efficiency and renewable energy investments, at a pace consistent with available funding.
2. Provide excellent customer service to all Energy Trust participants, with a level of effort that reflects funding.
3. Encourage innovative technologies and practices.
4. Assure that two-year budgets and action plans are balanced and equitable.
5. Support development of clean energy businesses.
6. Communicate the value of energy savings and renewable energy generation.

7. Maintain an efficient, effective and transparent organization that responsibly invests ratepayer funds.

About Energy Trust target audiences:

- **Residential** customers (primarily single-family homeowners, also renters and homebuyers)
- **Business** customers (includes multifamily property owners, small business, large business and commercial developers)
- **Industry and agricultural** customers (includes small and large industry, farms and wood products)
- **Renewable energy** customers (includes small wind, hydro and biomass; note that residential and business solar customers fit into the residential and business categories above)
- **Public sector** customers (includes municipalities, schools, etc.)

These services focus on the residential customer segment.

3. Scope of Work for Services Sought

Energy Trust's five year strategic plan places a priority on accelerating energy-efficiency and renewable energy investments, at a pace consistent with available funding. A second strategic plan goal seeks to communicate the value of energy savings and renewable energy generation. Energy Trust's Homes Group, working in collaboration with the Communications and Customer Service Group, seeks an external contractor with expertise in public relations services that will support the achievement of these strategic plan objectives through heightened demand for our residential offerings. Experience delivering public relations services statewide in Oregon is required, as well as a track record of earned media and resulting consumer awareness and engagement.

Specific services to be provided by the contractor are summarized below.

2011 Residential Public Relations Needs

Purpose: Provide public relations services designed to:

- generate positive media coverage of Energy Trust residential programs, offerings and services
- increase customer awareness of Energy Trust residential programs, offerings and services
- increase customer participation in Energy Trust residential programs, offerings and services

Meetings and correspondence with Energy Trust residential marketing manager and other staff will be required as appropriate, along with coordination with other Energy Trust contractors and affiliated utilities. Additionally strategic planning, key message development, spokesperson

training, local travel and general coordination of public relations opportunities would be included. While contractor will work directly with the residential marketing manager in the Homes Group, contractor may also work with Director and Sr. Manager of Communications and Customer Service in delivering the services.

Task 1 – Update and Execute Existing Residential PR Plan for 2011

Meet with Energy Trust Residential Marketing Manager to review existing public relations priorities; revise according to feedback. Execute plan for remainder of 2011.

Task 2 -- Develop 2012 Residential PR Plan

Meet with Energy Trust Residential Marketing Manager to determine public relations needs and priorities.

- Develop a month-by-month plan for proactive residential public relations activities and present to Residential Marketing Manager and CCS Senior Manager. Revise and finalize according to feedback.

Task 3 - Proactive Residential Public Relations

- Based on the approved Residential Public Relations plan, execute strategies and tactics to support the plan, working with appropriate residential program staff and residential marketing manager.
 - Develop press materials, including press releases, fact sheets, media kits and pitch letters
 - Obtain program content, background and technical detail from program staff
 - Submit press materials for Energy Trust review and approval according to established protocols
 - Distribute press materials to appropriate media
 - Provide media relations including phone and email pitches, phone calls, meetings and media list updates
 - Coordinate news stories with media and appropriate Energy Trust staff, including schedule, location, props and background materials. Attend interviews.
 - Prepare spokespeople for interviews, providing key messages, sample questions and practice opportunities

Task 4 - Reactive Residential Public Relations

Following Energy Trust Media Protocol, field inquiries from media and work with appropriate Energy Trust staff to provide information, research, and interviews

- Prepare spokespeople for interviews, providing key messages, sample questions and practice opportunities
- Coordinate news stories with media and appropriate Energy Trust staff, including schedule, location, props and background materials. Attend interviews.

Task 5 - Prepare and Submit Monthly PR Report

- Prepare and submit monthly PR report outlining projects completed and media placement report to Residential Marketing Manager and CCS Administrative Assistant.

Task 6 - Social Media

Consult with Energy Trust Manager of Online and Interactive Strategy regarding social media strategy and, when requested, provide postings/content to further Energy Trust PR goals.

6. Submission Requirements and Additional Considerations

Responses are due by July 1 at 5pm. Energy Trust encourages responders to be as sustainable as possible in their approach to their responses to the RFQ. Proposals may be submitted via mail or email. A maximum length of five pages (does not include signature page or cover letter) will be accepted and double-sided responses are preferred. If the proposal will be submitted by mail, please provide three copies.

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Questions about the RFQ can be submitted until June 27, 2011, via email. All questions and answers will be posted at <http://energytrust.org/About/consultant-rfqs>. Please submit questions to denise.olsen@energytrust.org: Residential Public Relations RFQ

6.1 Submission Requirements

Proposals shall include information relating to the following categories and be submitted to Energy Trust in accordance with the schedule below. Please note page length requirements and deadlines.

One page (outside five page limit)

- **A cover letter** describing your company's background, proficiency and approach to providing the required services and a summary of the RFQ response.

In no more than five pages address each of the following elements:

1. **Contractor or Firm Background.** Identify relevant past work for current and previous clients, staff assigned to this contract, key clients and other relevant facts.
2. **Pricing proposal.** Disclose all costs associated with your services. Specifically include hourly costs for services described in this RFQ.
3. A description of your **experience developing public relations plans targeting residential consumers.**
4. A description of your **experience crafting effective media messaging in response to media inquiries.**
5. Description of your track record of generating positive media placement in Oregon media outlets, detailing medium and outlet, in terms of advertisement equivalent cost of placement and other measures of success.
6. Describe your knowledge, if any, of the residential energy efficiency and solar energy market.
7. **Three (3) professional references** including company name, contact name and title, contact phone and email and company address.
8. Disclose any direct or indirect, actual or potential **conflicts of interest** with Energy Trust.
9. Include a signed and completed **Representations and Signature page**, in the form attached to this RFQ as Appendix A, certifying the representations stated therein. (outside five page limit)

6.2 Schedule

The following table outlines the RFQ schedule (subject to change by Energy Trust):

Scheduled Activity	Date
Energy Trust issues Request for Qualifications	June 13, 2011
Deadline for respondent questions and requests for additional information (via email only, to denise.olsen@energytrust.org . All questions and answers will be posted at http://energytrust.org/About/consultant-rfq).	June 27, 2011
RFQ responses due	July 1, 2011
Interviews/reference checks with top respondents (if held)	Complete by July 8, 2011
Energy Trust selection team enters into contracting with successful responder	Complete by July 15, 2011
Start of contract period	August 1, 2011

6.3 Selection Process

Contractor Selection Criteria

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

- The response is substantially incomplete or exceeds page limits
- The response does not address the objectives and requirements of this RFQ
- Response is inconsistent with Energy Trust policies or requirements
- A conflict of interest exists

Responses will be evaluated by but not limited to the following criteria:

- Quality of Response - Clarity and completeness
- Specifications - Demonstrated ability to meet detailed specifications
- Price Proposal - Competitiveness, clarity, and simplicity

Energy Trust also reserves the right to change the criteria used to evaluate responses.

Status of Response

Responding companies may inquire about the status of their response via email (denise.olsen@energytrust.org). Specifically, they may inquire about the receipt and condition of proposal materials and receive an update as to whether their proposals are still under consideration. All responding companies will receive notification when a contractor has been selected.

7. RFQ Governing Provisions

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 RFQ, 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 RFQ.
- Disqualify proposals that do not meet the requirements.
- Negotiate with respondents to amend any proposal.
- Select and negotiate and/or enter into agreements with respondents who are most responsive to the RFQ and whose proposals best satisfy the interests of Energy Trust and not necessarily on the basis of price alone or any other single factor.
- Issue additional subsequent solicitations for proposals, including withdrawing this RFQ at any time and/or issuing a new RFQ 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 RFQ process on any terms and conditions.
- Suspend or modify the RFQ process at any time.
- Enter into relationships with more than one respondent.

Confidentiality

Except as required under law or for regulatory purposes Energy Trust will maintain confidentiality of all proprietary and confidential information marked as such.

No Commitment /Resulting Contract

This RFQ does not constitute an offer by Energy Trust, nor does it commit Energy Trust to enter into a contract or similar undertaking with the candidate or any organization associated with the candidate. Energy Trust reserves the right to enter into relationships with more than one candidate. Energy Trust also reserves the right to suspend or modify the RFQ process or to issue a new RFQ for call center services that would supersede and replace this one. No binding obligation shall be created unless Energy Trust or its representative and the concerned parties execute a binding agreement. Final selection implies that Energy Trust and the select respondent expect to reach a contractual agreement which would outline the roles and responsibilities of all parties. No award will be considered a commitment until a written contract has been executed by Energy Trust with the selected respondent(s). The contract term cannot exceed two years.

No Reassignment

All proposals shall state that in the event of an award from Energy Trust, the resulting contract(s) and obligations shall not be sold or reassigned without the written permission of Energy Trust.

Conflict of Interest Disclosure

Respondents shall disclose in their proposal all direct or indirect actual or potential conflicts of interest it or any of their 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.

Validity and Deadlines

All proposals shall specify the date through which the proposal is valid. At a minimum, proposals shall be valid through June 30, 2011.

Waiver of Claims and Proposal Costs

The candidate waives any right it may have to bring any claim, whether in damages or equity, against Energy Trust, its Board, agents, employees or contractors, with respect to any matter arising out of any process associated with this RFQ. This RFQ does not obligate Energy Trust to pay any costs incurred by any respondent in the preparation or submission of a proposal. Once submitted, proposals will not be returned to respondents.

RFQ Clarification/Interpretation

Any clarification or interpretation of the RFQ documents shall be issued in writing by Energy Trust. Oral instructions or information concerning the RFQ given out by Energy Trust employees or agents to prospective respondents shall not bind Energy Trust.

Additional Information

Energy Trust may request additional information prior to final selection.

Odwyerpr.com

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 request 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 Qualifications 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 proposal 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 history of the respondents, 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 respondent's proposal is under consideration.

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: _____
Respondent Firm Name: _____
Authorized Signature: _____
Printed Name: _____
Title: _____