

## **Request for Proposals**

### ***Public Relations and Communications Contractor***

Request for Proposals released: September 10, 2015

Proposals due: 5:00 p.m., October 8, 2015

#### **1. Introduction**

Energy Trust of Oregon, Inc. (Energy Trust), an Oregon nonprofit, 501(c) (3) corporation, is issuing a Request for Proposals (RFP) for a Public Relations and Communications Contractor (Contractor). The successful Contractor will work with Energy Trust to support a variety of public relations, outreach efforts and communications, with the goal of engaging consumers and businesses throughout Oregon and select communities in southwest Washington, and keeping key parties informed of Energy Trust services, results and impacts.

The Contractor will develop and execute public relations and communications strategy, related efforts and campaigns. The Contractor will help maintain Energy Trust's relationship with media and suggest and propose stories of interest to motivate consumer/business action. The Contractor will serve as a communication resource producing written materials. Additionally, the Contractor will identify opportunities to expand awareness and engagement in Energy Trust programs for all eligible customers through communication and public relations efforts.

It is Energy Trust's intention to solicit proposals from respondents with communications and public relations capabilities. There is an incumbent firm currently providing a portion of the services in this RFP. Energy Trust is anticipating a significant number of responses to the RFP and will examine all proposals carefully. Preference will be given to agencies with experience working with nonprofits and public agencies and who have some familiarity with Energy Trust. Agencies with Oregon-based staff able to meet in-person without travel costs are sought. The Contractor will be a key resource for public relations and communications strategies as Energy Trust strives to meet aggressive energy-efficiency and renewable energy generation goals.

#### **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 more than \$1.9 billion on energy bills. Our work helps keep energy costs as low as possible and builds a sustainable energy future.

Energy Trust designs energy-efficiency and renewable energy programs for customers of the four participating utilities, and works with contracted companies (Program Management Contractors and Program Delivery Contractors) to manage those programs and bring them to the market. Those companies may also be engaged with these services to Energy Trust through face-to-face customer outreach, events and sponsorships and public relations.

To learn more about Energy Trust visit [www.energytrust.org/about](http://www.energytrust.org/about).

##### ***Energy Trust Five-Year Strategic Plan***

Energy Trust's five-year Strategic Plan, 2015-2019, outlines energy efficiency, renewable energy and operational goals. Additionally, it identifies key strategies and objectives over the plan period, including:

- Attract and serve new and more diverse customers

- Ensure internal operations are efficient and effective
- Help lower energy-efficiency and renewable energy costs to maximize customers' return on investment
- Test and introduce new, efficient technologies even faster
- Leverage synergistic collaborations and pursue projects that yield multiple customer benefits

### ***Energy Trust target audiences***

*Residential customers* (primarily single-family homeowners, also renters)

- Likely to have knowledge of ways to conserve energy.
- Usually in contact with an energy improvement contractor only when engaging in an energy upgrade, and may need help selecting the right contractor for the job (may need to reference the Trade Ally Network).
- While metro residents may be interested in environmental stewardship, rural residents may be interested in energy independence.
- Many are receptive to the idea of reducing waste.
- Current customer base skews to a middle-aged, home-owning group.
- May be more likely to act after discussing energy-efficiency and conservation opportunities with an expert, peer or neighbor.
- Upfront costs may be a barrier to investments in solar energy systems, energy-efficiency improvements and energy-saving products.
- Most see Energy Trust as a third-party, credible source of information.

*Commercial business customers* (includes multifamily property owners, small business, large business, commercial developers, nonprofit organizations and government agencies)

- While some sectors may be experiencing an expanding economy, other sectors may be experiencing a stagnant economy.
- Respond to the strategic business case for investment in energy efficiency and renewable resources (solar).
- Want to work with someone who understands their needs.
- May not know how to control energy consumption or understand how energy is used or wasted in their businesses.
- Usually don't know where to start thinking about their energy use. Payback period is most important to them.
- May lack technical knowledge to make choices without help.
- Seek counsel from qualified experts.
- Some see value in marketing green/sustainable practices.

*Industry and agricultural business customers* (includes small and large industry, farms and wood products)

- Are concerned about the potential cost to their businesses from energy cost fluctuations.
- Respond to the strategic business case for investment in energy efficiency and renewable resources.
- Want to work with someone who understands their needs.

- Usually don't know where to start thinking about their energy use.
- May lack technical knowledge to make choices without help.
- Seek counsel from qualified experts; want a long-term relationship with an energy expert acting as a member of their team.
- Payback period most important to them.
- May see value in marketing green/sustainable practices.
- Likely to understand the role of energy and energy efficiency in making their company successful.

*Renewable energy customers* (includes small wind, hydropower and biopower; note that residential and business solar customers fit in to the residential and business categories above)

- Relatively difficult to find the exact mix of opportunity, technology and investment.
- Have a renewable resource available for a project.
- May be involved in emerging technology for small-scale energy production.
- Energy Trust incentives are necessary for making a project viable.
- Have varying levels of technical knowledge and feasibility studies inform investment decisions.
- Are likely to have projects with benefits beyond energy generation (e.g., water savings).

### ***Current public relations and communications strategy***

Energy Trust seeks to engage customers, stakeholders and communities through several channels as outlined below. Energy Trust also provides information to stakeholders through regular reporting, outreach and responses to frequent information and data requests.

### ***Public communications and reporting***

Energy Trust is accountable to the Oregon Public Utility Commission and is committed to providing visibility and transparency in operations and results. A public annual report and quarterly and annual reports to the OPUC are part of that effort. Staff lead this work and pull information from across the organization for this purpose. Contractor will support broader communication of results and impacts to the public and stakeholders, recommending channels for consideration and supporting implementation.

Energy Trust communication staff also provide support for large communication projects emerging from program need, public, regulatory or stakeholder interest in Energy Trust, energy efficiency or renewable energy generation. Contractor may assist with the development of communication tools or strategy related to these larger communication efforts.

### ***Energy Trust website and social media properties***

Energytrust.org is a primary customer and stakeholder engagement channel. In addition to offers for consumers and businesses, the website houses extensive information on energy efficiency and renewable energy topics. A web development contractor aids with design, content development and user experience, and in-house staff manage the site and its content. These web services are not sought as part of this contract. The site, along with Energy Trust's e-newsletter content (blog), Facebook, Twitter and other social media properties are leveraged for public communications and program promotion. Contractor may be engaged to identify communication strategies and activities utilizing these channels to meet public engagement, program and outreach objectives.

### *Public relations*

Energy Trust has a variety of public relations needs, including planning, proactive and reactive public relations, media training, organizational communications and speechwriting. This work covers a broad range of topics and activities and can be high volume at times. Contractor to develop and support public relations strategy for residential programs, organization and business programs, and apply resources to meet other areas of work identified. Contractor also provides monthly and quarterly media tracking and reporting on media coverage.

### *Outreach, sponsorship and events*

In addition to outreach staff assigned to specific programs, Energy Trust has general outreach staff that support the Energy Trust presence in eastern and southern Oregon and maintain a community relations presence in Portland and the Willamette Valley. Sponsorships and events are outreach activities that can be leveraged to generate awareness, and highlight customer and project successes and action in specific communities or with certain customer groups. Large events with multiple communication and outreach components may be supported by this Contractor.

## **3. Scope of Work for Services Sought**

Energy Trust seeks a Contractor to perform the following services:

### ***Required services and experience***

- Press release development
- Broad communications strategy
- Consumer public relations strategy
- Media relationship management
- Reactive media response and engagement
- Proactive media pitching, talk point development, spokesperson preparation and media engagement
- Integrated public relations campaigns
- Event management
- Messaging
- Writing in addition to press release and talk point development
- Media tracking and reporting
- Crisis communication
- Media training
- Organizational tools - calendar, team meetings, collaboration site
- Social media campaigns and audience development

### ***Other services and experience—not required at this time but potentially in the future***

- Awareness campaigns
- Speechwriting
- Best practice consultation
- Presentation training
- Style guide tools for staff

## **4. Resulting Contract**

The selected respondent 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 alternative pricing. Key terms in any resulting contract include the following: Appropriate license and certification requirements, timely and accurate invoicing requirements, requirements that written contracts with subcontractors performing portions of the services include provisions requiring such subcontractors to adhere to requirements incumbent upon the selected respondent in its contract with Energy Trust, 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 media consent forms for Contractor and third-party written and visual reference to individuals, organizations, projects or sites, conflict of interest disclosure requirements, confidential information nondisclosure requirements, indemnification for third-party claims and limitation of liability provisions, and insurance requirements.

Time is of the essence with regard to these services and prolonged contract negotiations will not be undertaken. In general, Energy Trust strongly prefers contracts that are consistent with Energy Trust's standard terms and conditions; negotiations for such contracts can generally be completed quickly. In some cases, a few terms and conditions may need to be substituted or waived, in accordance with contract negotiations. Any party involved in these contract discussions can terminate negotiations at any time and for any reason. If it appears that contract negotiations are not proceeding in a timely manner, Energy Trust may opt to terminate the discussions and select another respondent.

## **5. Proposal Requirements**

Proposals shall include detailed information relating to the following categories submitted to Energy Trust in accordance with the schedule below in no more than 15 pages, not including the required Representations and Signature page (as set forth in **Appendix A** to this RFP) and one set of public relation and communication samples

- Describe your firm's approach to the Scope of Work sought as described above in **Section 3.**, including with respect to account management, back-up account management, project management, budget management, use of sub-contractors, intake and discovery for client services.
- Describe your firm's background, proficiency and approach to providing the services, both required and possible future services, as well as integration of those services with other contractors or staff, as listed in **Section 3** above.
- Describe the experience and any relevant certifications or awards of individuals that will comprise the Contractor team, including names, titles and hourly rate. Also, indicate how long the members of the proposed team have worked together and list projects they have completed together. Include their experience reaching diverse communities and customer types Energy Trust aims to serve
- Describe your experience developing public relations plans that target stakeholder, industry, residential and business consumers with the intent to spur specific, desired actions, as well as experience in crafting effective media message strategy for media inquiries or media stories.
- Describe your track record of generating media placement in Oregon, regional and national media outlets, detailing medium and outlet, in terms of advertisement equivalent cost of placement, responses and other measures of success.
- Provide a pricing proposals, by project or time and materials and/or alternatives.

- Describe relevant Contractor industry experience (environmental, sustainability, energy efficiency, renewable energy, behavior change, nonprofit, utility and public sector).
- Describe relevant past work for current and previous clients, and describe areas of work across Energy Trust's service territory and your experience working in rural markets.
- Describe past work in creating outreach, public relations and other engagement campaigns that engage a variety of types of consumers and communities as well as to small to large business markets. Describe your firm's ability and approach to providing communications and public relations services to a diverse target audience.
- Provide one set of samples relevant to the Scope of Services sought.
- Disclose any direct or indirect, actual or potential conflicts of interest with Energy Trust.
- Provide a complete description of your firm's insurance coverage to be provided for the Contractor services sought, 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 these limits
  - Effective dates
- Banking references
- Specify the date through which the proposal is valid. At a minimum, proposals shall be valid for 180 days from the proposal receipt deadline (see below).
- Include a signed and completed Representations and Signature page, in the form attached to this RFP as Appendix A, certifying the representations stated therein.

## **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.
- A conflict of interest exists.

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

- Contractor approach to this work and client services.
- Relevant experience in energy, public, nonprofit or sustainability industries.
- Demonstration of executing Scope of Services with evidence of success for residential, stakeholder, industry and business audiences.
- Demonstration of media relationships at the local, regional and trade level to support success.
- Experience developing compelling communications and messaging for stakeholder, industry, business and residential audiences.
- Understanding the scope of work and detailed response.
- Relevant experience reaching diverse target groups.
- Relevant experience of individuals, and individuals as a part of a team.
- Reasonable cost.

## **7. Schedule and Instructions for RFP Submission**

### ***Schedule***

Post to website and distribute RFP	September 10
Intent to Respond due	September 18
Questions due	September 25
Questions posted at <a href="http://www.energytrust.org">www.energytrust.org</a>	September 8-25
Proposals due	October 8
Inform finalists	October 22
Finalist interviews	October 27 – November 13
Inform selected Contractor	November 17
Develop draft scope of work	November 30-December 11
Begin contracting	December 14
Final contract	December 30
Work begins	January 1

### ***Intent to Respond***

**Respondents are encouraged to submit Intent to Respond email by 5:00 p.m., September 18, 2015 to:**

**[sue.fletcher@energytrust.org](mailto:sue.fletcher@energytrust.org), Subject: Public Relations and Communications Contractor RFP**

### ***Questions***

**Questions can be submitted through September 25, 2015**, via email, and will be posted at [www.energytrust.org/About/consultant-rfqs](http://www.energytrust.org/About/consultant-rfqs). Please submit questions to:

**[sue.fletcher@energytrust.org](mailto:sue.fletcher@energytrust.org), Subject: Public Relations and Communications Contractor RFP Questions**

### ***RFP Submission***

**Proposals are due by 5:00 p.m. October 8, 2015.**

Energy Trust encourages responders to be as sustainable as possible in their approach to their responses to the RFP. A maximum length of 15 pages will be accepted, not including the Representations and Signature Page or public relations and communications samples. Please include only one set of samples. Proposals shall be submitted via email or other electronic format. A single hard copy is not necessary, but may be sent at the discretion of the responder to Sue Fletcher, Energy Trust of Oregon, 421 SW Oak St., Suite 300, Portland, OR 97204.

## **8. RFP Governing Provisions**

### ***Agreement to All Terms***

By submitting a response to this RFP, respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and explicitly agrees and accepts the following provisions of this RFP and all other terms and conditions set forth in this RFP.

### ***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.

### ***Ownership of Responses***

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

### ***Confidentiality***

Respondents shall clearly identify those portions for their responses 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.

### ***Respondent Expenses and Waiver of Claims***

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. Respondent waives any right it might have to bring a claim against Energy Trust, its Board of Directors, employees, contractors, or agents with respect to any matter arising out the RFP.

## **9. 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.
- Negotiate with respondents to amend any proposal.
- Select and negotiate and/or enter into agreements with respondents who are most responsive to the RFP 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 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.



**APPENDIX A**

**REPRESENTATIONS AND SIGNATURE PAGE**

**(Submit this page as the first page of your proposal.)**

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 Proposals in its entirety and agree unconditionally to all of its conditions and requirements. Including but not limited to, the RFP Governing Provisions.
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:** \_\_\_\_\_