

Energy Trust of Oregon Request for Qualifications (RFQ): Community Energy Resilience Planning, Capacity Building & Project Development Support

RFQ Issued: October 2, 2026

Questions Due: October 13, 2026

Response to Questions Posted: October 27, 2026

Proposals Due: November 6, 2026

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About Energy Trust of Oregon

Energy Trust of Oregon (Energy Trust) is an independent nonprofit organization selected and overseen by the Oregon Public Utility Commission (OPUC) 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.

Energy Trust serves a broad range of partners, stakeholders and customers, including people with low and moderate incomes, communities of color and rural communities. In all cases, our vision—clean, affordable energy for everyone—is the north star that guides our planning, decision-making and communication. In everything we do, we seek to improve lives today while creating a sustainable future for generations to come.

More information about Energy Trust's background, funding sources, strategic and action plans, policies and programs is available on our website at www.energytrust.org/about.

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

Background

Community energy resilience is a core priority of Energy Trust's 2025-2030 Strategic Plan and 2026-2030 Multiyear Plan. Through its strategic focus on supporting community resilience, Energy Trust is working to help communities prepare for, withstand and recover from disruptions caused by extreme weather, wildfires, public safety power shutoffs and other hazards by incorporating energy efficiency, renewable energy and battery storage into local resilience planning efforts. Energy Trust has established goals to initiate and develop resilience relationships across all 36 Oregon counties and all nine federally recognized Tribes and to support measurable growth in community resilience planning and project development statewide.

A key component of this work is the FEMA Community Energy Resilience Grant (CERG) Program, funded through FEMA's Advanced Assistance Hazard Mitigation Grant Program (HMGP). Unlike a traditional HMGP construction grant, Advanced Assistance funding supports planning, community engagement, project development, and funding readiness activities that better position communities to compete for future HMGP and other resilience funding. Through this RFQ, Energy Trust is procuring a professional service contractor to deliver these activities on Energy Trust's behalf. The

selected firm will serve as a contractor to Energy Trust and will not be a subrecipient or subawardee of FEMA funding.

The CERG Program intends to engage at least 12 communities across Oregon in resilience planning and project development activities that advance both FEMA hazard mitigation objectives and Energy Trust's strategic resilience goals. Funding from FEMA for the CERG Program allows Energy Trust to support community energy resilience planning and project development on a statewide basis, independent of investor-owned utility (IOU) service territories or public purpose charge (PPC) eligibility.

Energy Trust is also funding resilience planning using PPC funds. While these funds can be used for counties, they are primarily focused in this RFQ on municipalities, community organizations, school districts, special districts and Tribes. Public purpose charge funds are restricted to Pacific Power and Portland General Electric territories.

Through this RFQ, Energy Trust seeks to establish either a single contractor, or pool of qualified professional services contractors that can support both FEMA CERG implementation and broader community energy resilience capacity-building efforts across Oregon. Contractors will provide technical support, planning, engagement and project development services that help communities advance energy resilience goals and prepare for future investment in resilience projects.

Note on terminology and focus areas:

- FEMA CERG funds are primarily focused on counties and Tribal Nations that have approved/active Hazard Mitigation Plans.
- Because this RFQ combines two related program pathways, the term “community” has pathway-specific meanings.
 - For CERG-specific activities, “communities” refers to Oregon counties, municipalities, and Tribal Nations, and their designated representatives.
 - For PPC-specific activities, “communities” includes counties, municipalities, Tribes, and other community-based organizations advancing community energy resilience projects that provide critical community services within Pacific Power and Portland General Electric territories.
 - Across both pathways, the intent is to help communities strengthen organizational readiness, explore community energy resilience opportunities, and position themselves for future state, federal, and philanthropic funding opportunities.
- We recognize that the term “resilience hub” may have different meanings across communities and contexts. For the purposes of this solicitation, a resilience hub refers specifically to a community-serving facility equipped with redundant energy resources (e.g., microgrid or battery backup) that can support communities and sustain critical services during power outages and other emergencies.
- These facilities may serve as:

- **Community gathering locations** during emergencies, including cooling and warming centers.
- **Critical facilities** that maintain essential services during disruptions, such as water and wastewater treatment, fire stations, healthcare facilities, and other emergency support sites.
- **Providers of essential community services**, including food assistance, senior services, and other support programs that help meet community needs during and after disruptions.

Project Overview

Energy Trust is seeking qualifications from contractors to provide community energy resilience planning, community capacity-building support, project identification and prioritization, project-development coordination and funding-readiness support for Oregon communities. This RFQ combines two closely related needs into a single solicitation:

Community Energy Resilience Grant Program (CERG) support, funded by Energy Trust's Advanced Assistance Hazard Mitigation Grant from the Federal Emergency Management Agency (FEMA) through the Oregon Department of Emergency Management.

Renewable Energy Custom Solutions Program (CuSP) community energy resilience support, funded through Oregon Public Utility Commission-related funding mechanisms and intended to complement CERG by supporting similar community energy resilience planning and project-development activities outside or alongside the CERG pathway.

The work under both program pathways is expected to be highly similar: contractors will help communities understand opportunities for microgrid projects that provide energy resilience, identify and prioritize critical facilities and energy resilience hub sites, support community engagement, coordinate with Energy Trust staff and technical contractors, and help communities move from planning to implementation. The RFQ is intentionally structured as one solicitation because Energy Trust expects overlap in the skills, staffing, relationships and methods needed to deliver both scopes effectively.

Respondents should clearly understand that the solicitation includes two distinct funding streams and two related, but separate, program pathways, each of which may have different compliance, eligibility, reporting, and invoicing requirements. Contractors selected through this RFQ may be asked to support one or both program pathways, and Energy Trust reserves the right to make multiple awards, award work by region, award work by program pathway, or award work in whole or in part. A contractor selected through this RFQ process will be required to comply with all applicable federal and state laws and grant requirements.

Contractors must be able to track work, budgets, deliverables, invoices and reporting by program pathway and funding stream. Contractors may not assume that work

performed under one pathway is automatically eligible for payment under the other pathway. Energy Trust will identify the applicable funding stream, eligibility rules, and reporting expectations for each assigned community or project. Contractors may indicate whether they would like to support part or all of the services sought in this RFQ and may adjust their proposed budget accordingly.

What We're Trying to Accomplish

Energy Trust is interested in providing capacity and technical support to Oregon communities seeking to increase the energy resilience of critical community infrastructure, facilities and services through the planning & prioritization for microgrid development and other on-site renewable energy resilience solutions.

Services may be provided through either the CERG Program Pathway or the CuSP Pathway.

The contractor will work directly with those assigned and/or approved communities to provide:

- Community energy resilience planning
- Community engagement and education
- Project prioritization
- Capacity support
- Program participation support and navigation

Success Looks Like:

- Communities understand their energy resilience needs, priorities and available program pathways and have the capacity, information and support needed to make informed decisions about potential resilience investments.
- Communities have planning documents that clearly describe local vulnerabilities, critical facilities and services, potential resilience hubs, and priority opportunities for microgrids or other on-site renewable energy resilience solutions.
- Communities can identify and prioritize potential project sites using community knowledge, available data and mapping resources, with the contractor facilitating a community-led decision-making process.
- Communities understand the findings and implications of technical analyses and are prepared to use those findings to make informed decisions about whether and how to advance priority projects.
- Communities are better positioned to pursue project-development assistance, incentives and state, federal, local, private or philanthropic funding by having clearly documented priorities, coordinated technical information and organized application-readiness materials.
- Energy Trust has a clear understanding of community-prioritized energy resilience projects and the support pathways needed to advance them.

- Energy Trust has greater visibility into high-impact community resilience projects and opportunities for future engagement and investment.
- Communities recognize Energy Trust as a trusted technical resource and strategic partner in the evolving energy resilience space.

Scope of Services Sought

Energy Trust seeks to contract with one or more organizations to provide engagement, program navigation and capacity-building support for Oregon communities pursuing energy resilience planning and project development. The services will help communities understand available program pathways, build local capacity and move energy resilience priorities forward with coordinated support.

Primary Deliverables

1. Community Outreach, Education & Engagement

- Coordinate with Energy Trust staff to engage, educate and support Oregon communities interested in increasing community energy resilience and preparedness through microgrids, critical facility resilience projects and resilience hubs.
- Provide direct, ongoing support to communities assigned by Energy Trust to assess their energy resilience needs, build understanding of energy resilience concepts and opportunities, and support participation in the applicable program pathway.
- Serve as a primary point of contact between communities and Energy Trust, document community priorities, values, and constraints, and facilitate meetings and ongoing coordination to support community engagement and informed decision-making throughout the engagement, planning and development processes.

CERG-specific expectations:

- Engage emergency management as the primary point of contact for participating communities and maintain coordination with emergency management staff throughout each community's participation as appropriate.
- Communities may participate in the CERG program at different levels based on their interest, capacity, and readiness. Some communities may only receive energy resilience education or planning support and may not advance to project prioritization or technical analysis.

CuSP-specific expectations:

- Support outreach and engagement with communities located within IOU service territories that are interested in community energy resilience planning and project development.

- This may include communities with varying levels of capacity, readiness, or availability that are seeking to advance microgrid or energy resilience hub opportunities. Primary points of contact may include:
 - County emergency management
 - County/city planning staff
 - City managers
 - Non-profit leadership
 - Others as appropriate

Potential Deliverables:

- List of communities/entities engaged
- Summary of activities performed

2. Energy Resilience Planning, Site Identification and Prioritization

- Document community priorities, vulnerabilities, critical facilities, existing or potential energy resilience hubs, clean energy opportunities and recommended implementation pathways in an energy resilience plan or planning document.
- Support communities in identifying and prioritizing locations for potential microgrids, critical facility resilience projects and resilience hubs that improve community preparedness and resilience to natural disasters and long-term energy disruptions.
- Support and guide communities as they work to identify critical facilities and energy resilience hub sites, facilitate community discussions on site prioritization, support interpretation of relevant data and mapping tools, and translate insights into decisions about priority sites and projects.

CERG-specific expectations:

- Community energy resilience plans that support hazard mitigation objectives and are suitable for incorporation into local planning documents such as county Natural Hazard Mitigation Plans (NHMPs).
- Plans should be similar to the community energy resilience planning requirements established in Oregon House Bill 3630.
- Support emergency management officials and participating communities in utilizing available tools and resources to support identification and prioritization of microgrid locations.
- Facilitate and support collaborative data analysis among local emergency management officials, local government, community members, Energy Trust staff and technical contractors.
- *The contractor will facilitate and support community-led site selection but will not be responsible for selecting sites on behalf of communities.*

CuSP-specific expectations:

- Planning documentation should help communities advance any community energy resilience goals into prioritized project concepts and sites.

- Assist with community energy resilience project identification and prioritization, including projects that may be candidates for:
 - Energy Trust project-development assistance and custom incentives
 - ODOE Community Renewable Energy Program support
 - Natural Hazard Mitigation Plan-related funding
 - Other state, federal, local, or private funding opportunities

Potential Deliverables

- Planning documents for each community interested in participating in the planning support option (some counties already have plans and some may not be interested in formal documentation, this does not exclude them from participation).
- Onboarding communities to available tools to support site identification.
- Location-specific priority site lists.

3. Project Development Coordination and Advancement

- Assist communities, Energy Trust staff and Energy Trust contractors in advancing prioritized energy resilience concepts into feasibility or other project-development activities.
- Coordinate and support communities through microgrid screenings, energy resilience hub concept development, utility considerations, site-readiness review, project-development sequencing and technical assistance.
- Facilitate discussions with community partners on technical analyses, project concepts and key considerations to support informed decision-making and project advancement.
- *The contractor will not conduct or prepare feasibility studies for sites identified by communities.*

CERG-specific expectations:

- Serve as the liaison between communities, Energy Trust staff and Energy Trust contractors throughout the feasibility study process.
- Coordinate with technical contractors analyzing potential community identified microgrid sites.
- Communicate community inputs & priorities and help translate technical findings back to communities for review and feedback.

CuSP-specific expectations:

- Help project proponents identify, prioritize, and advance microgrid and resilience hub projects from planning into initial project-specific analysis.
- Support communities in understanding next steps to project implementation.

Potential Deliverables

- Community feedback summaries on technical findings and site evaluations.

- Project development roadmaps for communities that identify sequencing, key decisions and support needs.

4. Funding Preparation & Grant Application Support

- Support communities in preparing for current and future funding opportunities for community energy resilience planning, project development, feasibility, design and construction.
- Coordinate information sharing among participating communities, Energy Trust staff, technical consultants, and grant-writing contractors.
- Help gather, organize, and document materials needed to support funding applications.
- *The contractor will not be responsible for writing or submitting grant applications.*

CERG-specific expectations:

- Support communities participating in FEMA's Benefit Cost Analysis (BCA) and Hazard Mitigation Grant Program (HMGP) grant-development processes led by Energy Trust.
- Coordinate communication between communities and Energy Trust staff responsible for BCA development.
- Support community understanding of BCA processes, organize and compile materials needed for HMGP grant development, and facilitate engagement between communities and grant-writing contractors.

CuSP-specific expectations:

- Help communities prepare to connect with further project-specific support and funding.

Potential Deliverables:

- Coordination and communication support between communities, Energy Trust staff, grant-writing contractors, and technical consultants throughout funding preparation activities.
- Organized project information, supporting documentation, and coordination of completed materials needed for communities to pursue funding opportunities.
- Document funding pathways and action plans that outline key milestones, responsibilities, and resources needed to pursue priority funding opportunities for communities.

Schedule Assumptions

Energy Trust anticipates contracting to begin December 2026. For the CERG Program, services anticipate concluding in 2028 based on existing grant timelines, with the possibility of extending through 2029. For CuSP pathway activities, services will conclude two years from the contract start date.

Budget Assumptions

Energy Trust anticipates making awards under two distinct program pathways and funding streams through this RFQ. Respondents should be prepared to support one or both program pathways and must be able to separately track budgets, invoices, expenditures, deliverables, and reporting requirements by funding source. Energy Trust reserves the right to revise budget assumptions for either funding pathways at any time. Moreover, Contract terms and budgets are subject to change by the FEMA CERG program, which may result in the modification or early termination of services.

Energy Trust may make awards by territory, by program pathway, or to multiple contractors to ensure adequate geographic coverage and program delivery.

Energy Trust reserves the right to award work in whole or in part, by funding stream, by territory, by task area, or through multiple contracts, based on program needs and the qualifications received.

CERG-specific Budget Assumptions

The Community Energy Resilience Grant (CERG) Program is funded through a Hazard Mitigation Grant from the Federal Emergency Management Agency (FEMA) administered through the Oregon Department of emergency management.

Approximately \$1.1M is available for the CERG-specific scope of work described in this RFQ.

CuSP-specific Budget Assumptions

The CuSP Community Energy Resilience Pathway is funded separately from CERG and is anticipated to have a total budget of up to \$500,000 over a maximum two-year contract term.

Submission Requirements

Respondents' proposal must contain each of the elements listed below. Submissions must be clear, complete, and concise. Please limit your response to 8 pages, not including work product example, references, insurance documentation, or signature page. Pages must be numbered, sections must be clearly titled, and fonts must not be smaller than 11 points. Failure to include any required elements may result in the rejection of respondent's proposal.

1. Qualifications & Experience

Proposals should describe the respondent organization's expertise and experience conducting similar work from the scope of services listed above, including experience serving Oregon communities and established relationships with relevant Oregon-based stakeholders and organizations. Please reference examples of previous similar work.

Respondents should identify the project team roles (the members of the proposed Development and Support team), including team members and management, who will be providing services throughout the term of the agreement. Contractor will remain fully responsible for the performance of all subcontractors and for ensuring that subcontractors comply with all applicable requirements of the resulting contract.

Required Qualifications

- Contractor, and any proposed subcontractors, must demonstrate the ability to provide timely, on-the-ground support to participating communities throughout Oregon and be available to travel statewide and/or within their designated region as needed to support project activities.
- Demonstrated experience providing community planning, technical assistance, facilitation, or project development support for local governments, Tribal governments, emergency management personnel, community-based organizations, utilities, nonprofits, or other public-serving entities in the state of Oregon.
- Experience managing multi-stakeholder projects that require coordination among community members, government entities, emergency management personnel, public agencies, technical consultants, funders, and other partners, including facilitating meetings, documenting outcomes, and maintaining project momentum.
- Experience supporting energy resilience, clean energy, climate resilience, hazard mitigation, emergency preparedness, community planning, infrastructure planning, grant development, or related initiatives.

Preferred Qualifications

- Experience supporting communities with the development of energy resilience plans, energy resilience strategies, microgrid projects, Natural Hazard Mitigation Plans (FEMA), or other community resilience or planning initiatives.
- Experience helping communities identify, evaluate, prioritize, and secure funding for resilience, infrastructure, energy, climate, emergency management, or community development projects, including familiarity with state and federal funding programs.
- Demonstrated experience coordinating among communities, technical consultants, and program staff to advance community energy resilience, microgrid, and resilience hub projects from concept development through feasibility-stage decision making and project-development planning.

The proposal should also include information on any business certifications held by the respondent or its subcontractors, if applicable, such as certifications through the Oregon Certification Office for Business Inclusion and Diversity (COBID), the U.S. Small Business Administration (SBA), or other recognized certification programs. Respondents that do not hold certifications may describe other approaches they use to support inclusive

contracting practices, community partnerships, local economic participation, workforce diversity, or engagement with historically underserved communities.

2. Cost of Services

Provide a detailed budget proposal based on the proposed methods and staffing plan. Respondent should provide details of the cost and pricing structure proposed for the scope of services with as much detail as possible. Energy Trust will consider any proposed cost structures. Respondents may submit pricing for each individual item in the scope of services.

3. Diversity, Equity, and Inclusion Experience:

Proposals should describe respondent's efforts and experiences in integrating diversity, equity, and inclusion into their business operations, both internally and externally. 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. Energy Trust also values approaches that build meaningful relationships within the communities being served and contribute to local capacity and economic benefit. Respondents should describe how they support local community engagement and partnership development, including, where applicable, strategies such as local hiring, use of local vendors and services, subcontracting opportunities, or other practices that strengthen community connections and create local benefit. Respondents must provide responses to each of the questions in **Appendix B**.

4. Data security and Confidentiality:

Proposals should provide a brief description of respondent's approach to data security and confidentiality, including:

- The types of customer, project, or other confidential information expected to be collected, accessed, stored, transferred, or analyzed during performance of the work.
- The systems, platforms, cloud services, and data transfer methods that would be used.
- The technical and administrative safeguards that would be implemented to protect confidential information, including access controls, encryption, secure file transfer methods, data retention practices, and incident response procedures.
- Any applicable industry certifications or independent security assessments (such as SOC 2, ISO 27001, or comparable standards) held by the respondent or subcontractors.
- A description of respondent's policies governing the use of artificial intelligence (AI) tools, including approval processes, restrictions on use with confidential or customer data, and applicable privacy protections.
- If respondent or its subcontractors do not maintain relevant security certifications, a description of the policies, procedures, and controls used to protect information throughout collection, transfer, storage, analysis, and disposal.

5. 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.

6. 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.

7. 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 or actual 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 RFQ response. The determination of whether a conflict of interest exists is left to the sole discretion of Energy Trust. This information should be provided in an appendix to the proposal.

8. 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.

RFQ Schedule & Administration

RFQ Schedule

- October 2, 2026 - RFQ issued
- October 13, 2026 - Questions/request for additional information due
- October 27, 2026 - Clarifications/question responses posted to website
- **November 6, 2026 - Proposals due**

Requests for Additional Information and Proposal Submission

Any questions and/or requests for clarification regarding this RFQ must be submitted via email to the contact named below by **October 13, 2026**. Responses to questions and requests for additional information will be posted on Energy Trust's website no later than **October 27, 2026**. Energy Trust cannot accommodate individual phone, mail, or fax inquiries about the RFQ. All questions must be submitted via email.

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 5 PM Pacific Time on **November 6, 2026**. Energy Trust will not be obligated to consider information received outside this time interval for the purposes of this RFQ.

Please submit proposals to:

Sommers Taylor

Project Manager – Renewable Energy

Energy Trust of Oregon

Email: sommers.taylor@energytrust.org

Revisions to RFQ

If it becomes necessary to revise any part of this RFQ, 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 RFQ. Clarification given by Energy Trust may become an addendum to the RFQ.

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).

RFQ 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 RFQ 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 RFQ, unless specifically included in a written addendum issued by Energy Trust.

Proposal Costs

Each proposal prepared in response to this RFQ 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 RFQ.

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 for this RFQ.
- Disqualify proposals that do not meet the requirements of this RFQ, 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 RFQ 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 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.

Resulting Contract(s)

The selected respondent will be required to execute a written contract(s) with Energy Trust to perform the 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 work, 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 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 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

DEI hiring practices and policies

1. Is respondent's firm required to submit equal employment opportunity (EEO) reports? (For companies of 100 staff members or more, the Equal Employment Opportunity Commission requires regular filings of form EEO-1.)
 - a. If so, provide a copy of respondent's most recent EEO-1 report.
 - b. If not, please provide a summary of staff from respondent's firm who would be performing work on this project, using a table format and employment data categories aligning with EEO-1 reporting – see [this sample form](#), specifically, the table in section D.
2. Provide specific examples of activities, projects, or plans developed by respondent that demonstrate how respondent promoted DEI within respondent's company in the areas of (1) recruitment, hiring, retention and promotion, (2) training and professional development, and (3) respondent's company strategy.

DEI planning, evaluation, and research experience

1. Provide specific examples of how the respondent has practiced cultural humility and responsiveness in work similar to the services described in this RFQ. Include examples of how community input, local knowledge, or stakeholder feedback informed project design, engagement approaches, decision-making, or implementation.
2. Describe one or two examples where community stakeholder feedback changed the respondent's approach, project design, or engagement strategy.