



Portland General Electric
121 SW Salmon Street • Portland, OR 97204
portlandgeneral.com

March 7, 2025

Public Utility Commission of Oregon
Attn: Filing Center
201 High Street, S.E.
P.O. Box 1088
Salem, OR 97308-1088

Re: UM 1020 – Portland General Electric Company’s Request for Proposal for Program Marketing Services for Residential and Small Commercial Voluntary Renewable Energy Program and Acquisition of Renewable Energy Certificates to Meet Participant Demand

Portland General Electric Company (PGE) submits the draft of its Request for Proposal (RFP) for Program Marketing Services and/or Renewable Energy Certificate Supply for PGE’s Residential and Small Commercial Renewable Energy Products. PGE’s current contracts expire December 31, 2025. PGE is filing this draft to give stakeholders the opportunity to provide any feedback on the draft document before it is released to bidders. It must be noted that this document is a draft only and is not a finalized RFP.

Stakeholders will be invited by Public Utility Commission of Oregon Staff to file written comments on this draft RFP before it proceeds to a Public Meeting. PGE is targeting a April 15 approval date for this RFP so the final RFP can be released to bidders on April 22, 2025. Stakeholders should submit written comments on PGE’s draft RFP documents no later than March 24, 2025.

Should you have any questions or comments regarding this filing, please contact Casey Manley at (503) 464-8250. Please direct all formal correspondence and requests to the following email address pge.opuc.filings@pqn.com

Sincerely,

\s\ Jaki Ferchland

Jaki Ferchland
Sr. Manager, Rates and Regulatory Affairs
Pricing, Tariffs and Power Costs

cc: Eric Shierman, OPUC
Sarah Hall, OPUC



REQUEST FOR PROPOSAL

**Program Marketing Services and/or Renewable Energy Certificate
Supply for PGE's Residential and Small Commercial Renewable Energy
Products**

dated

04/22/2025

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SECTION 1: INTRODUCTION

Introduction

Portland General Electric Company (“PGE”) is a vertically-integrated electric utility engaged in the generation, purchase, transmission, distribution, and retail sale of electricity in the State of Oregon. The Company’s corporate headquarters is located in Portland, Oregon and its approximately 4,000 square mile, State-approved service area, entirely within the State, encompasses 51 incorporated cities.

Please visit the company web site at www.portlandgeneral.com for more detailed information. A service area map depicting PGE’s service coverage area as well as other pertinent company information may be found on the company web site under the “Our Company” tab.

General Description of Request

Portland General Electric Company (“PGE”) seeks your proposal for Program Marketing Services and/or Renewable Energy Certificate (“REC”) supply for PGE’s Green Future Choice and Green Future Block products for the January 1, 2026 – December 31, 2028 contract term. Bidders may provide proposals for either or both of those services (“RFP”).

The term "Bidder" shall mean any person or company receiving this RFP or submitting a proposal in response to this RFP.

PGE Representative

The PGE Representative for all correspondence related to this RFP is as follows:

Sasha Froblom
Portland General Electric
121 SW Salmon Street, 1WTC0505
Portland, OR 97204
Phone: (503) 464-2822
Email: sasha.froblom@pgn.com

Bidder shall send its proposal and all correspondence regarding the RFP to the PGE Representative. To ensure timely and adequate consideration of your proposal, Bidder must limit all contact, whether verbal or email, pertaining to this RFP, to the designated PGE Representative above for the duration of the RFP process. Any communication to other PGE individuals about this RFP, without the approval of the PGE Representative, may disqualify Bidder from further consideration.

Questions

In the event Bidder has questions regarding this RFP, Bidder must consolidate its questions into one submittal, utilizing the attached Question and Answer document. All questions must be received by PGE by the question due date indicated in the RFP Schedule below. Only questions received by the question due date will be responded to by PGE. PGE will provide responses to all the questions received to all Bidders, while keeping the source of the questions anonymous. Bidder is responsible for ensuring that no confidential information is provided within the questions it submits.

SECTION 2: SCOPE OF WORK

Detailed Description of Project

Background on PGE’s Green FutureSM Programs

PGE has offered voluntary renewable energy products to customers for more than 25 years. This RFP focuses on two voluntary renewable energy products and an additional environmental product offered under the “Green Future” program umbrella:

1. **Green Future Block** participants purchase 200 kilowatt-hour (kWh) “blocks” of renewable energy for \$1.88 per block each month. Program funds remaining after covering the cost of marketing, program administration, and REC supply are allocated to a Renewable Development Fund and used to support the construction of new renewables in Oregon.
2. **Green Future Choice** (*most popular*) participants match 73% of their monthly electricity usage with renewable power for an additional \$0.0094 per kWh over and above the Customer’s basic cost of service rate. PGE is committed to ensure that at least 27% of the energy sold to all customers is renewable energy (aligned with PGE’s current Renewable Portfolio Standard benchmark of 27% renewable). Therefore, by matching 73% of usage through Green Future Choice, customers can be “100% renewable”. Program funds remaining after covering the cost of marketing, program administration, and REC supply are allocated to a Renewable Development Fund and used to support the construction of new renewables in Oregon.
3. **Habitat Support** participants pay an additional \$2.50 each month to support native fish habitat restoration projects in Oregon. Habitat funds are administered by a non-profit partner, currently The Nature Conservancy. Customers must be enrolled in Green Future Choice or Green Future Block to be eligible to participate in Habitat Support.

Bidder(s) selected for Program Marketing Services will be expected to offer the Habitat Support option alongside Green Future Choice and Green Future Block options (“Program”). PGE also offers voluntary green power products to large commercial and industrial customers called Green Future Enterprise (PGE tariff Schedule 54) and Green Future Impact (PGE tariff Schedule 55). Work on these products is not included in this RFP.

Eligibility: Residential (schedule 7) and Small Commercial (Schedule 32) customers who have not been disconnected due to late bill payment within the previous 12 months.

Participation: Customers may participate in Green Future Choice and Green Future Block at the same time. Participation is voluntary. Customers must proactively opt-in to participate and may drop from the Program at any time with no penalty. Customers choosing Green Future Block may elect to purchase multiple blocks per month. Participants continue to pay the cost of basic service plus an incremental per kWh amount (Green Future Choice) that will fluctuate each month with their actual electricity use or a fixed amount (Green Future Block) that will remain consistent each month.

Program revenue: Program revenue must cover all Program costs, including those that will be used to compensate the successful Bidder(s) from this RFP. As such, PGE is a steward of Program participant dollars and seeks to ensure they are used responsibly to promote participants’ interests of driving demand for new renewable energy generation while keeping the cost of participation accessible for a broad diversity of utility customers. Retail rates for Green Future products are subject to change upon approval by the Oregon Public Utilities Commission.

Industry leadership: PGE’s Green Future Products are industry leading, ranked #1 in total participants for 15 years, green sales rate for 5 years, and consistently ranking #2 or higher for total Megawatt-hour (MWh) sales since 2003 and participation rate since 2009 on the National Renewable Energy Lab’s (NREL) top ten lists (<https://www.nrel.gov/analysis/assets/pdfs/green-pricing-top-10-2022-data-plus-archives-28aug2024.pdf>).

Reference material:

- Information on PGE’s Green Future program can be found at
 - <https://portlandgeneral.com/greenfuture> and

- <https://choosegreenfuture.com/>
- Tariffs for PGE's portfolio Green Future products can be found at
 - Residential (Schedule 7):
https://assets.ctfassets.net/416ywc1laqmd/6RgTNk5RU1bldl0LdPpIY9/224cb878a8f52a0ac72cb6b4cf40e603/Sched_007.pdf
 - Small Business (Schedule 32):
https://assets.ctfassets.net/416ywc1laqmd/4CBP1s8kyYcAKxIVeCTxEf/c4bbacb45de26baf35b4614c0cdc9a45/Sched_032.pdf

Regulatory Oversight: The Oregon Public Utilities Commission (OPUC) oversees Green Future Choice, Green Future Block, and Habitat Support. The OPUC may audit Program costs and outputs, including marketing and administration costs. Industry and community stakeholders also participate via recommendations to the OPUC that have informed aspects of Program design over the decades the Program has been offered. Prospective Bidders are advised that OPUC review may extend to the Bidder's costs and initiatives related to the contract awarded as a result of this RFP.

Program oversight: Green Future Choice and Green Future Block were Green-e® Energy certified by the non-profit Center for Resource Solutions through 2024. The Program decertified for RY 2025 due to uncertainty in the market as to how to comply with and/or source RECs in the Western Region that would meet the new Green-e® Energy Standard. This RFP requests supply options that enable, as well as omit recertification starting in 2026. However, whether recertification is an option or not, Green Future will be managed to a high standard for customer disclosure, communications, and high-quality RECs. On an annual basis, all marketing may be subject to a marketing compliance review and all REC supply will be audited. Bidders seeking to support marketing and/or REC supply are expected to support respective activities and act as a partner to ensure compliance with the Green-e® Energy National Standard and Code of Conduct, FTC Green Guides, and/or similar best practices. These documents are available at <https://www.green-e.org/programs/energy/documents> and <https://www.ftc.gov/news-events/topics/truth-advertising/green-guides>.

Key Performance Indicators (KPIs):

	Green Future Choice			Green Future Block		
	2022	2023	2024	2022	2023	2024
Residential						
Eligible Customers	798,683	799,606	808,483	798,683	799,606	808,483
Participants	227,633	225,683	219,561	6,666	8,945	9,723
MWh Sales	2,036,856	2,014,652	1,883,273	20,058	29,479	31,700
Gross Enrollments	34,144	34,300	25,934	690	1,326	1,647
Small Business						
Eligible Customers	94,843	94,753	95,942	94,843	94,753	95,942
Participants	3,687	3,910	4,059	141	286	261
MWh Sales	55,271	56,866	59,906	530	1,176	1,150
Gross Enrollments	439	633	625	7	3	3
Total						
Eligible Customers	893,526	894,359	904,425	893,526	894,359	904,425
Participants	231,320	229,593	223,620	6,807	9,231	9,984
MWh Sales	2,092,127	2,071,519	1,943,178	20,588	30,655	32,850
Voluntary Attrition	1.1%	1.3%	1.75%	1%	1.6%	2.3%
Involuntary Attrition	14.1%	15.3%	14.4%	8.1%	8.3%	10.9%
Gross Enrollments	34,583	34,933	26,559	697	1,329	1,650

Notable data points to support interpretation of KPIs:

- Customers can participate in both Green Future Choice and Green Future Block. For example, in 2024, 3,785 customers were enrolled in both products resulting in a unique participation rate of 25.4%. When reporting externally about Program performance, PGE uses the unique participation total and rate to avoid double counting.
- Attrition is defined by drops as a percentage of participation. Involuntary attrition is tracking drops that are due to activities that make it impossible to continue participation, like moving out of the service territory. Voluntary attrition is tracking customers who decide to drop from the Program when they could have continued participation.
- Green Future Choice residential participation and gross enrollments have declined each year due to fluctuations in Green Future enrollment visibility during the web and phone start/move service process.
- Green Future Choice changed its matching levels from 100% to 73% beginning in 2025 to align with Oregon’s Renewable Portfolio Standard benchmark for utilities of at least 27% renewables. By taking what renewables PGE is already purchasing into account, Green Future reduced costs for participants who want to be 100% renewable. Therefore, historic figures are 27% higher than what might be likely in a future year with similar participation and weather. Overall, MWh sales are more impacted by the weather than changes in participation, though the latter does have some impact.

Program Marketing Services

PGE is seeking a vendor to provide white-label Program Marketing Services that balance new and efficient Program growth and awareness potential across all modes of communication while ensuring a high-quality customer experience. The Bidder(s) selected for Program Marketing Services will be expected to work in close partnership with PGE staff to support an overall team approach to delivering the highest quality experience to customers and Program results.

At minimum, Bidders should provide at least one marketing plan that results in up to 12,000 gross enrollments annually across Marketing Partner Driven Channels/Tactics (described below). This volume of enrollments, plus what PGE expects to enroll via inbound and organic enrollments through PGE-Owned Channels, is what PGE forecasts may be required to maintain current Program participation levels.

Bidders may also provide a marketing plan that results in a higher annual gross enrollment target across Marketing Partner Driven Channels to support PGE’s interest in exploring Program growth. Bidders may define and provide additional marketing plans for PGE’s consideration.

Bidders are expected to define what is included in their Marketing plans. Bidders may include (but are not limited to) any awareness, acquisition, and/or retention tactic previously conducted and/or supported by marketing partner(s) (“Marketing Partner Driven Channels/Tactics”).

Marketing Partner Driven Channels/Tactics:

- Outreach
 - Tabling at storefronts and community events
 - Door-to-door canvassing
 - Outbound calls
- Print marketing
 - Direct mail
 - Bangtails & bill inserts
- Digital marketing
 - Digital advertising
 - Microsite development and hosting

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- Email
 - Retention tactics:
 - A welcome letter that includes a Green Future window decal
 - Program newsletter
 - Annual report/impact letter/email
 - Miscellaneous consulting & support services
 - Product and/or marketing innovations
 - Reporting to and working with oversight groups and Oregon Public Utilities Commission (OPUC) staff
 - Data analysis and targeting (A/B tests, Program KPIs like attrition, purchase size, response rate, propensity scores)

PGE-owned channels/tactics:

- Customer Contact Center
- New customer welcome packets
- Bill messages
- Utility website
- Utility Mobile App
- Utility social media accounts

All Program marketing may drive customers to enroll and/or learn more about Green Future via PGE’s website, mobile app, and Customer Contact Center. Bidders are encouraged to include design, copywriting, and marketing recommendations for PGE-Owned Channels to support tactics conducted by Bidder. Marketing Partners do not find a predictable measure of success influencing enrollments due to investment or engagement across PGE-Owned Channels/Tactics, independent of Bidder efforts that drive customers to enroll via these channels. For these reasons, the request is limited to efforts where Bidders can be most successful.

All marketing plans should increase customer awareness of their renewable energy options and provide equitable access to a customer-friendly enrollment experience across customer segments. Bidders should also keep in mind that PGE offers a diversity of products to customers and ensure that marketing plans consider a holistic customer journey and an ongoing customer relationship.

REC Supply

PGE is seeking a vendor to provide Renewable Energy Certificate (REC) supply to satisfy the total Green Future Choice and Green Future Block participant demand in 2026, 2027, and 2028. RECs must align with PGE’s tariff schedule requirements and adhere to industry best practices, including:

- establishing and managing to the mix of renewable resources disclosed in annual prospective and historic product content labels,
- leveraging tracking systems (like WREGIS, M-RETs, etc) to transfer RECs,
- auditing RECs annually to affirm that the mix projected aligns with the mix delivered to a high degree and that all customer purchases were fulfilled,
- delivering RECs generated within a 21-month window that includes the full 12 months of the year when customers purchased them, the last 6 months of the previous year, and first 3 months of the following year, and
- sourcing RECs from facilities that came online within the past 15 years.

Bidders are encouraged to present the following three supply strategies with pricing options:

1. 100% Western Electric Coordinating Council (WECC) + Green-e® Energy Certified
2. 100% Western Electric Coordinating Council (WECC) (*no certification required*)
3. 100% National + Green-e® Energy Certified

Bidders are encouraged to present any other supply strategies with pricing options that deliver value to Green Future participants.

PGE's purchasing preference includes (in numbered order):

- Geography (WECC products):
 - 1.) PGE's service area
 - 2.) State of Oregon
 - 3.) Pacific Northwest (OR, WA, ID)
 - 4.) 100% WECC
- Renewable Resource:
 - 1.) Wind and/or Solar
 - 2.) Geothermal
 - 3.) Low-Impact Hydro
 - 4.) Biomass
- Facility online date:
 - 1.) Within 5 years
 - 2.) Within 10 years
 - 3.) Within 15 years

PGE's preference for geography for National products is less defined. Bidders are encouraged to demonstrate how their supply strategy provides Program participants with a quality product despite it being further from home.

(Optional) Bidders are also encouraged to provide an optional adder that would enable PGE to incorporate a minimum volume of RECs that meet Oregon's Department of Environmental Quality (DEQ) Clean Fuels Program requirements¹ to unlock incremental clean fuels credits from residential Green Future participant EV charging. This volume would be a subset of any supply strategy, not in addition to the total RECs required to meet Program participant demand. The expected volume needed is approximately 77,100 MWhs in 2026 with a potential growth of up to 10% annually depending on EV adoption and Green Future participation among residential EV drivers.

Minimum Acceptance Criteria (May submit for either or both Marketing Services and/or REC Supply. See criteria for specific services below.)

Marketing

- A. Knowledge of local market and PGE service territory.
- B. Experience creating and launching omni-channel marketing plans.
- C. Experience with the use of various marketing channels, including but not limited to email, direct mail, digital and social advertising, and sponsorships.
- D. Experience with adhering to applicable laws (i.e., Telephone Consumer Protection Act (TCPA), CAN-SPAM Act, etc).
- E. Experience designing and conducting quality assurance audits and addressing/reducing customer complaints.
- F. Experience adhering to client branding guidelines.
- G. Experience with project management platforms and integrating with client processes to ensure ease of execution of marketing plans.
- H. Experience leveraging different modes of communications (i.e., dashboards, presentations, written reports) to share data analytics, learnings, and campaign success with stakeholders.
- I. Previous work experience with regulated industries (i.e., utilities, financial, etc).
- J. Experience with multi-language marketing, especially Spanish.
- K. *(preferred)* Experience designing and executing telemarketing campaigns.
- L. *(preferred)* Experience with environmental claims (i.e., FTC Green Guides, etc).
- M. *(preferred)* Experience marketing environmental products (i.e., carbon offsets, RECs, etc).

¹ See "Eligible requirements for RECs" section on the first page of ODEQ's Instructions for using Renewable Energy Certificates in the Clean Fuels Program: <https://www.oregon.gov/deq/ghgp/Documents/cfpRetiringRECs.pdf>

REC Supply

- A. Previous experience supplying Green-e® Energy certified RECs to meet voluntary Green Power Programs.
- B. Extensive experience sourcing, purchasing, and providing market intelligence on RECs to utility staff.
- C. Utilization and understanding of WREGIS, MRETs and other applicable tracking systems for REC transfers and retirement.
- D. *(preferred)* Previous experience working with CRS for Green-e® Energy certification, specifically with Annual Verification Audit.

Information Security (Applies to all Bidders handling PGE data)

- E. PGE data is encrypted data at-rest and in-transit using algorithms and key lengths that meet the NIST SP 800-32 guidelines.
- F. PGE data would be logically segmented or otherwise separate from other tenant data.
- G. Bidder access to PGE data is limited through the principles of Least Privilege and Segregation of Duties.
- H. Access policies regarding PGE data are enforced through procedural and automated control mechanisms.
- I. Activity in relation to PGE data is logged in sufficient detail to identify the who, what, where, and when and is retained for at least one year.
- J. If PGE employee access is required, you support integration with PGE's federated identity management solution (aka Single Sign-On) or Multi-factor Authorization (MFA).
- K. Cybersecurity insurance with a minimum limit of \$5,000,000 per claim.
- L. Data Center used to house PGE data is considered tier 2 or higher based on the Telecommunications Industry Association (TIA)-942 or equivalent standard.
- M. Bidder has a formalized and documented Information Security Program with implemented controls based off industry best practices such as National Institute of Standards and Technology (NIST), Center for Internet Security (CIS), and Cloud Security Alliance (CSA).
- N. Malware security is required.
- O. Established disaster recovery and business continuity processes, procedures, and controls.

Incorporated Documents

The following documents are hereby incorporated into this RFP by reference.

1. Portland General Electric Master Purchase Agreement
2. Exhibit A.1 –OR- Exhibit A - PGE Contractor Insurance Requirements
3. PGE Data Security Addendum
4. Submittal Part 1- Proposal Letter
5. PGE Question and Response Form
6. Pricing Workbook
7. Supplier Diversity Spend Plan Template

SECTION 3: PROPOSAL REQUIREMENTS

RFP Schedule

The following table sets forth the RFP Schedule. PGE reserves the right to modify or change this schedule at its discretion.

Date	Activity
April 22, 2025	RFP issued to Bidders via email invitation
April 28, 2025	Acknowledgement of intent to bid via Email returned
May 1, 2025	Bidders submit questions via email by 2:00 PM , Pacific Time
May 13, 2025	PGE's responses to questions released to all Bidders via email by 5:00 PM , Pacific Time
June 3, 2025	RFP responses due by 2:00 PM , Pacific Time
Week of June 23, 2025	Finalist Bidder Presentations (if necessary)
August 2025	External Bidder Selection/Contract Execution
January 1, 2026	Launch marketing and/or outreach plan(s)

List of Required Submittals

A complete proposal includes submittal of the documents listed in Submittal Parts 1 - 3, as follows:

Submittal Part 1

Proposal Letter (Return in PDF format)

Bidder must complete and sign the Proposal Response Letter included with this RFP.

Submittal Part 2

Please provide the following information completely and accurately and in the format requested. The purpose of this format is to allow PGE to evaluate the Bidder responses quickly and accurately and to help ensure the Bidders have responded fully to the requirements. Compliance to this format will enable PGE to locate the required information for verification and analysis.

No pricing information is to be provided in Submittal Part 2. A complete proposal includes submittal of the documents listed, as follows.

Bidders may provide proposals to Program Marketing Services and/or REC Supply services. Some sections are only required for Bidders seeking to provide one or more of those services and are identified in parenthesis, as applicable.

Technical Capabilities

1.0 Company Information (All Bidders to complete)

- 1.1 State the service(s) included with your bid (i.e. Program Marketing Services and / or REC Supply).
- 1.2 Provide Bidder's company overview, product/service offering, number of years Bidder has been in business, and number of companies utilizing your services.
- 1.3 Describe Bidder's affiliation with other companies and industry associations.
- 1.4 Provide Bidder's Headquarters location, other office locations, and local staff presence.
- 1.5 Describe any unique features, technology, strategy, etc., that sets Bidder apart from other firms.
- 1.6 Describe Bidder's approach to corporate responsibility, including efforts to promote diversity, equity, and inclusion.

2.0 Experience (All Bidders to complete, unless otherwise specified)

2.1 Describe Bidder's experience:

- 2.1.1 Working with utilities including utility name, utility location, number of customers served by utility, description of services, product type (i.e. REC-based, community solar, etc), duration of contractual relationship, and participation growth during that time.
 - 2.1.1.1 If Bidder has not worked with other utilities, please describe experience working with regulated industries and how that experience would translate well to the services requested in this RFP. Include as much applicable, like-information as what is requested of those with utility experience.
- 2.1.2 Reporting to regulatory bodies and/or community stakeholder groups.
- 2.1.3 **(Program Marketing Services Bidders only)** Complying with FTC Green Guides and Green-e® Energy requirements, including supporting the successful completion of Green-e® Energy Marketing Compliance Reviews.
- 2.1.4 **(Program Marketing Services Bidders only)** Designing and executing multi-language (especially Spanish) marketing efforts.
- 2.1.5 **(Program Marketing Services Bidders only)** Collaborating with other vendors who serve Bidder's client(s).
- 2.1.6 **(Program Marketing Services Bidders only)** Adhering to applicable laws like Telephone Consumer Protection Act (TCPA), CAN-SPAM Act, etc.

2.2 Describe non-compete policies.

2.3 Describe conflict of interest policies and identify any potential conflicts that could result from Bidder's proposal(s) being selected.

3.0 Program Marketing Services (Program Marketing Services Bidders to complete)

3.1 Propose Bidder's detailed Program marketing plan to:

- 3.1.1 Maintain Green Future program participation by delivering up to 12,000 gross enrollments annually across Marketing Partner Driven Channels/Tactics (see Section 2: Scope of Work of RFP under Program Marketing Services description). The proposed plan(s) should include, at minimum:
 - 3.1.1.1 Process for strategy development, execution, determining marketing saturation levels, and defining and measuring success of KPIs.
 - 3.1.1.2 Expected use of various marketing acquisition, awareness, and retention tactics. Please list all tactics included in the plan, channels used, percentage of budget allocated to each channel, and expected annual volume of customers to be reached by each tactic.
 - 3.1.1.3 Expected participation results over the contract period, including total participation and gross enrollments per year by customer segment and tactic.
 - 3.1.1.4 Description of how marketing revenue would be allocated between acquisition tactics, retention tactics, and administration.
- 3.1.2 *(optional)* Increase Green Future program participation by delivering more than 12,000 gross enrollments annually across Marketing Partner Driven Channels/Tactics. Proposed plan should include, at minimum, information requested in 3.1.1.1-3.1.1.4 above.

3.2 Describe how Bidder's approach to marketing ensures the highest quality of customer experience regardless of customer enrollment. As applicable, include any best practices, staff training, quality controls, customer service policies, and employee codes of conduct.

3.3 **(For Bidder's whose marketing plan includes talking directly to PGE customers)** Describe Bidder's process for following up on customer complaints and escalated issues, including timeline for resolution and coordination with PGE Staff.

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- 3.4 (For Bidder's whose marketing plan includes direct outreach tactics and/or Program microsite management) Describe Bidder's process for validation of enrollments and fraud prevention.
- 3.5 Describe Bidder's plan for engaging/coordinating with various departments within PGE, including the following:
- 3.5.1 PGE's marketing department to ensure alignment of brand and creative elements, synchronize with internal go-to-market processes, coordinate the timing of tactic efforts with other PGE campaigns, and identify any staff resource needs for executing Program marketing plan(s).
 - 3.5.2 Approach to integrate with client processes, software, and tools to ensure ease of collaboration, execution and tracking results of marketing plans, including experience with Salesforce Marketing Cloud (Email Studio & Journey Builder), Workfront Project Management, Quantum Metric, Tableau, Microsoft Office Suite (including Teams messenger), SharePoint, and any additional software or tools used across existing clients.
 - 3.5.3 Approach or expected utilization of any cross-product marketing and/or outreach efforts among PGE's other products and services.
- 3.6 Describe Bidder's tracking and reporting capabilities, reporting cadence, and statement of data requirements from Bidder.
- 3.7 Describe Bidder's Program enrollment propensity modeling capabilities.
- 3.8 Describe how Bidder will apply diversity, equity, and inclusion best practices to their marketing plan.
- 3.9 As an appendix, provide samples of digital and print marketing materials developed to acquire new participants as well as retain existing ones.
- 3.10 Provide a detailed project timeline which identifies the milestones required to launch a marketing plan by January 1, 2026.
- 4.0 Information Security (All Bidders handling PGE data to complete)**
- 4.1 Describe how Bidder will adhere to the terms outlined in PGE's Data Security Addendum, including any proposed modifications for PGE's review.
 - 4.2 Detail Bidder's regular penetration testing schedule and willingness to make these reports available to PGE for review.
 - 4.3 Describe secure data exchange methods Bidder will employ to ensure the integrity and confidentiality of data transmitted to PGE.
 - 4.4 Describe how Bidder encrypts sensitive data, both in transit and at rest, to meet PGE's data protection requirements.
 - 4.5 Describe what data access controls Bidder implements to restrict sensitive system and data access to authorized personnel only.
 - 4.6 Describe Bidder's incident response plan, including the procedures for addressing and reporting security incidents to PGE.
 - 4.7 Describe scope and cadence of Bidder's employee security training.
 - 4.8 Describe Bidder's protocol for regularly updating and patching software and infrastructure to address known security vulnerabilities.
 - 4.9 Describe Bidder's plan to develop high-level architecture for tracking, storing, and transferring data that aligns with PGE's operational needs and security requirements.
 - 4.10 As an appendix, provide:
 - 4.10.1 Bidder's detailed data security policies and procedures.
 - 4.10.2 Documentation of Bidder's compliance with industry-standard cybersecurity frameworks, such as SOC1, SOC2, and SOC3 certifications.

5.0 REC Supply (REC Supply Bidders to complete)

-
- 5.1 Describe Bidder's experience and qualifications for supplying RECs to meet Green Future Choice and Block customer demand during the contract term.
 - 5.2 Describe Bidder's experience in procuring RECs that comply with Green-e® Energy National Standard and supporting the successful completion of annual Green-e® Energy Verification Audits.
 - 5.3 Describe Bidder's process to provide REC market intelligence and subsequent recommendations for supply strategies to mitigate price volatility.
 - 5.4 Describe Bidder's supply strategy to:
 - 5.4.1 Mitigate price volatility or supply volumes during the term of this agreement.
 - 5.4.2 Demonstrate certainty of the availability of RECs sufficient to meet customer demand requirements over the contract term.
 - 5.4.3 Innovate and procure RECs to meet or exceed the preferences of PGE customers for local, additional, affordable, and impactful renewable energy projects.
 - 5.5 Process to evaluate/measure the effectiveness of the agreed upon sourcing strategy.
 - 5.6 Plans for sourcing and transferring eligible RECs to PGE sufficient to meet the prior year's customer load by March 31 or earlier of the subsequent year.

6.0 References (All Bidders to complete)

- 6.1 Please provide at least two (2) client references whose requirements are most similar to the current needs outlined within this RFP. These client references must be United States-based and operated, and preferably be an electric utility company. Each reference provided must be callable upon submittal of Proposal and include the following minimum information: Company Name, Contact Name, Contact Title, Contact Phone Number, and Contact Email.

7.0 Project Team (All Bidders to complete)

- 7.1 Key contact information of individual who will serve as a primary point of contact at Bidder's company for the purposes of this RFP including name, phone number, and email address.
- 7.2 Name, title, location, and experience of each project member, with key local individuals identified.

Submittal Part 3

Bidder must provide the following information in separate documents from the Proposal Letter and Submittal Part 2, Technical Capabilities. Upon award, some of the information included with this submittal will become part of the final contract documents.

Commercial Proposal

1.0 Bidder Financial Information (All Bidders to complete)

- 1.1 Bidder's exact legal name of the firm.
- 1.2 Bidder's form of legal entity under which business is conducted.
- 1.3 Bidder's Federal Tax Identification Number (TIN).
- 1.4 Bidder's physical address for the legal entity identified.
- 1.5 Provide copies of Bidder's audited annual financial statements for the two most recently completed fiscal years.
- 1.6 List all major investments in the last two years relative to asset acquisition, capital infrastructure upgrades, etc., as it relates to the scope of this RFP.
- 1.7 Provide Bidder's most current financial ratings (i.e., Moody's, Standard & Poors, Dun and Bradstreet) and any changes in ratings in the last two years.
- 1.8 Indicate any involvement in any sale, merger or acquisition activity. If any, please explain.

2.0 Program Marketing Services Pricing (Program Marketing Services Bidders to complete)

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- 2.1 Bidder must complete the Pricing Workbook and include as a separate attachment in the appendixes of Bidder's Submittal #3, Commercial Proposal. Bidder must complete each sheet in the Pricing Workbook, including Cost of Services, Staffing Resource Plan, and Expense Allocation. Bidder must provide complete pricing information for each Marketing Plan proposed.
 - 2.2 PGE intends to establish performance guarantees with the winning Bidder(s). Please describe your proposed performance guarantees, including minimum expectations associated with Marketing Plan(s) projections.
 - 2.3 Please describe any PGE resources that would be needed to support Bidder's Marketing Plan that are not already detailed in the "Expense Allocation" sheet of Bidder's Pricing Workbook.
 - 2.4 Describe Bidders proposed format of payments associated with work, such as any payment schedule based on specific milestones, retainers, or deliverables and criteria for completion. Note: PGE will not agree to Contract Execution Milestones (where PGE would be required to remit payment for simply signing a contract).

3.0 REC Pricing (REC Bidders to complete)

- 3.1 Describe Bidder's pricing options, including estimated price per REC, and any brokerage fees. Please include:
 - a. Proposed price per REC for approximately 1,500,000 megawatt-hours annually (+/- 10%)
 - b. Delivery schedule, REC resource(s) and geography
 - c. A fixed pricing strategy for the length of the contract.
 - d. Separate fixed pricing strategies are requested for (but not limited to) the following options:
 - a. 100% Western Electric Coordinating Council (WECC) + Green-e® Energy Certified
 - b. 100% Western Electric Coordinating Council (WECC) (*no certification required*)
 - c. 100% National + Green-e® Energy Certified
- 3.2 Optional Adder: Provide a fixed or variable pricing strategy to deliver RECs that would qualify for Oregon's Department of Environmental Quality (DEQ) Clean Fuels Program requirements to unlock incremental clean fuels credits from residential Green Future participant EV charging. The expected volume needed is approximately 77,100 MWhs in 2026 with a potential growth of up to 10% annually depending on EV adoption and Green Future participation among EV drivers.

4.0 Payment Terms (All Bidders to complete)

- 4.1 Bidder shall quote one of PGE's preferred payment terms below. Quoted payment terms and associated discounts will be considered in the commercial evaluation:
 - Virtual Card, NET 15
 - Net 45 Days, paid via ACH

5.0 Terms and Conditions (All Bidders to complete)

- If Bidder has an executed agreement with PGE which may serve to cover the services contemplated by this RFP, Bidder should include a copy of such agreement as part of its RFP response.
- Bidders should clearly state any proposed revisions to the agreement(s) identified in this RFP, in the form of a redlined markup of the agreement(s), including Portland General Electric Master Purchase Agreement, PGE Contractor Insurance Requirements, and PGE Data Security Addendum.
- Any final executed agreement(s) between PGE and Bidder will govern all aspects of a relationship between Bidder and PGE and nothing herein shall be interpreted otherwise.

6.0 Supplier Diversity (All Bidders to complete)

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- PGE is committed to fostering a diverse and inclusive procurement process that is based on a supplier's ability to meet the company's performance, price and quality requirements. One way of demonstrating this is by ensuring equal opportunity for qualified minority-owned, women-owned, disabled veteran-owned and emerging small business enterprises (MWESB) suppliers. These businesses are vitally important to the overall success of our company. We strongly encourage our prime contractors and major suppliers to support this supplier diversity focus through identifying and extending opportunities to diverse supplier sub-contractors and businesses (i.e. 'Tier 2' awards).
 - In this light, please complete the Supplier Diversity Spend Plan included with this RFP. If you cannot provide a spend plan (or if it is 'zero'), please identify steps taken to seek opportunity and why they weren't successful.

Submission of Proposals

Bidder must email the required submittal documents and any relevant supplementary materials, to the PGE Representative with the following subject: "**(Bidder Name) – Green Future Choice/Block RFP Due June 3, 2025**". Proposal is due by no later than **2:00 PM**, Pacific Time on proposal due date. Please limit the size of the email message(s) to **10MB**. Multiple emails may be used for submission, if necessary. PGE will provide confirmation of receipt of such submission via email.

Any proposal received after 2:00 P.M. PST on the bid due date or in a manner not specified in this RFP shall be considered non-responsive and may be excluded from award consideration. It is the Bidder's sole responsibility to ensure that delivery of the proposal is made before the specified due date and time and in the manner specified in this RFP.

IF BIDDER DOES NOT RECEIVE A CONFIRMATION FROM PGE THAT THE PROPOSAL HAS BEEN RECEIVED, BIDDER SHOULD ASSUME THAT THE PROPOSAL HAS NOT BEEN RECEIVED AND SHOULD CONFIRM RECEIPT OF THE PROPOSAL WITH PGE.

Alternate Proposals

In addition to submitting a proposal in full compliance with this RFP, Bidder may also submit an alternate proposal, or propose alternate features to its proposal, that Bidder believes will meet the basic objectives of this RFP and would be cost-effective and add value for Green Future participants. Such alternate proposal or features must be documented separately so that it will not be confused with the base proposal, and it must be submitted concurrently with the base proposal.

SECTION 4: RFP EVALUATION

Bidder Selection Process

PGE will evaluate each Bidder's proposal in several general areas, including:

- The completeness of the proposal in addressing all topics covered by the RFP.
- Bidder's experience and past performance with clients that are similar in size, scope and complexity to PGE, subject to the references checked by PGE.
- The effectiveness, efficiency, innovativeness, and creativity of Bidder's proposed configuration of services.
- Bidder's willingness to assign and retain experienced resources to support PGE.
- Allocation of risk and liability as set forth in the proposed form of agreement(s), including any work completed by sub-contractors; and
- Competitive pricing.

Validity of Proposal

Proposals are required to be valid for a minimum of one-hundred eighty (180) days following the due date for submission of the proposal. A proposal may not be modified after it is submitted without PGE approval.

SECTION 6: GENERAL PROVISIONS

Disclaimer

This RFP shall not be construed in any manner to create an obligation on the part of PGE to enter into any contract or serve as a basis for any claim whatsoever for reimbursement of costs for efforts expended by Bidder. Furthermore, the scope of this RFP may be revised at the option of PGE at any time and this RFP may be withdrawn or canceled by PGE at any time. PGE reserves the right to waive formalities and to add, modify, or delete items, requirements, schedule, or terms or conditions of this RFP prior to making an award.

Eligibility and Transfer

This RFP is intended for the sole use of the recipient to which it is addressed. Please notify the PGE Representative immediately if you are not the intended recipient of this RFP, and do not distribute, or take any action relying on it. Only those individuals, companies, and corporations having received this RFP document directly from PGE are eligible to submit a response.

Qualification of Personnel

Subject to and in accordance with applicable law, Bidder shall have, prior to assigning an individual as Bidder personnel or a subcontractor, and at Bidder's sole expense, appropriately verified, represent and warrant to PGE, that the personnel or subcontractors proposed in response to this RFP, performing the services, have the requisite qualifications, education, technical certifications and education degrees to perform the services in a competent, workmanlike manner in accordance with the applicable standards relevant to the Scope of Work described herein.

Reservation of Rights

PGE may, in its absolute discretion, select a proposal for award, reject any proposal as unsatisfactory or non-responsive, award a contract to other than the lowest priced proposal, award multiple contracts, or not award any contract, as a result of this RFP.

Return of Materials

At any time, PGE may, in its absolute discretion, require that any of its documentation and materials related to this RFP be returned or destroyed by Bidder.

Errors and Omissions

In the event Bidder discovers a material ambiguity, conflict, discrepancy, omission, or other error in this RFP, Bidder should notify the PGE Representative in writing of such discovery with a request for modification or clarification of this RFP.

PGE reserves the right to determine the materiality of such discovery or question. PGE may issue an Addendum to amend this RFP, extend the RFP due date if necessary, or provide answers to the questions received, in response to such discovery or question. Otherwise, PGE reserves the right to negotiate minor exceptions, irregularities, or errors in this RFP or the bid responses.

Confidentiality of Response

Notwithstanding any labeling as confidential, all information submitted in Bidder's response shall not be considered confidential or proprietary and may be disclosed or used by PGE or its affiliates for any purpose and in any manner without compensation, liability, or other obligation to Bidder, unless a nondisclosure agreement has been executed between PGE and Bidder with respect to such information. Bidder should only submit information that is necessary to understand and evaluate its proposal. If Bidder submits confidential information covered by an executed nondisclosure agreement, the nondisclosure agreement shall govern the confidentiality requirements for the confidential information.

Competitive Bidding

PGE encourages free and open competition among Bidders. At no time shall PGE be under any obligation or commitment to purchase any services from any Bidder to this RFP until after a contract has been signed by both PGE and the Bidder. The award, if any, will be made to the Bidder whose overall proposal is determined to be the most advantageous to PGE, in PGE's discretion. Notwithstanding the foregoing, this RFP is only an informal solicitation of proposals and is not intended nor should it be construed as a formal competitive bidding process pursuant to any statute, code, ordinance, rule, or regulation.

Code of Ethics

Upon receipt of this RFP through the final selection by PGE, Bidder shall not engage in any conduct that could be seen as improperly influencing PGE's decision. The exchange or offering of any money, gift item, personal service or unusual hospitality by Bidder and PGE is expressly prohibited. Failure to comply with this requirement will disqualify Bidder from participation in this RFP.

Non-Discrimination

Neither PGE nor Bidder shall discriminate in the provision of the proposed services in connection with this RFP on the basis of age, race, color, national origin, religion, sex, disability, qualified disabled veteran status, qualified veteran, or any other category protected by law.

Preparation and Presentation Costs

Bidder shall be solely responsible for all costs and expenses incurred in the preparation and presentation of its response to this RFP, including without limitation market research and attendance at meetings.

Prime Contractor and Subcontractors

PGE reserves the right to accept or reject any subcontractor Bidder identifies in its proposal. The prime contractor and all subcontractors must be clearly identified, at the task level, in the proposal.

Publicity

Bidder may not make any announcement or other disclosure regarding this RFP without the prior written consent of PGE, which PGE may withhold in its absolute discretion. Bidder may not use PGE's name or logo without the prior written consent of PGE, which PGE may withhold in its absolute discretion.

Compliance with Applicable Laws

All proposals submitted under this RFP shall comply with all applicable laws, including judgments, orders, decrees or consent agreements with any governmental agency or court, relating to the design, manufacture, promotion, advertising, marketing, sale, or pricing of any services identified in such proposal.