

**Request for Qualifications:
RFQ # 50510
Evaluation & Planning Contractors**



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1 Introduction

The Northwest Energy Efficiency Alliance (NEEA) is an alliance of more than 140 utilities and energy efficiency organizations working on behalf of more than 13 million energy consumers. NEEA is dedicated to accelerating both electric and gas energy efficiency, leveraging its regional partnerships to advance the adoption of energy-efficient products, services and practices.

Since 1997, NEEA and its partners have saved enough energy to power more than 900,000 homes each year. As the second-largest resource in the Northwest, energy efficiency can offset most of our new demand for energy, saving money and keeping the Northwest a healthy and vibrant place to live. www.neea.org

2 RFQ Background

The Market Research & Evaluation (MRE) team manages a large number of contracts for evaluation (measuring program progress and influences of programs' success); and planning (providing information and data that enables planning to accurately calculate energy savings). MRE believes that having a qualified group of consultants with known skill sets within our areas of need will enable us to:

- Have a higher level of collaboration with our providers
- Drive improved clarity and alignment around scope of work and expectation for deliverables
- Turn projects around faster, with a higher level of quality.

3 Objectives

The purpose of this request is to provide NEEA with a group of qualified consultants who can quickly and easily respond to requests for evaluation and planning needs. NEEA intends to approve contractors for this pool who are qualified in any or all of the categories as defined later in this document. While the scope and scale of evaluation and planning work often differ, this request is being combined for the convenience of contractors who bid for either or both evaluation and planning work.

4 Vendor Qualifications/Categories

Listed below are three broad work areas under which Evaluation and Planning projects are often categorized and for which contractors may submit qualifications. NEEA has also provided some detail on the types of tasks that would likely be part of a project in any given work area.

1. **Impact and/or Process Evaluation:** Evaluate progress towards program-specific Market Progress Indicators (MPIs), and understand the influence of program intervention / implementation efforts on achieving Market Transformation. The tasks associated with projects may include, but are not limited to:
 - a. Evaluation Design

- b. Sample Design
 - c. Logic Model reviews
 - d. Creating research instruments such as surveys and discussion guides
 - e. Qualitative & quantitative data collection, analysis and synthesis
 - f. Database creation
 - g. Document and secondary research review and synthesis
 - h. Report writing and presentation of results
 - i. Project management
2. **Measures Analysis:** Assist in the analysis and/or review of cost, savings, and applications for potential efficiency measures. Tasks may include, but are not limited to:
- a. Developing or reviewing marketplace assumptions
 - b. Developing an approach for approximating a metric that we do not have access to or may not exist within the context of our needs
 - c. Comparing established sources of information
 - d. Critiquing reliability of information
 - e. Assist with calculations such as cost effectiveness and savings
 - f. Develop, advise on or review engineering simulation models for energy efficiency
3. **Modeling Assistance:** Develop, update, review and/or revise inputs to, and outputs from, various market forecasting models for energy efficiency. These models forecast market dynamics, estimate energy savings potential and track the adoption of efficient measures over time. Tasks may include, but are not limited to:
- a. Reviewing/verifying results of various market forecasting models
 - b. Advising on the development of new market forecasting models
 - c. Assist with the calibration of market forecasting models to real world conditions

5 Submission Requirements

Your submission will include three sections:

- 1) Cover Letter;
- 2) A Key Information Section of up to 12 pages; and
- 3) Appendices, with page limits as discussed below.

There are three key areas of information NEEA requests for this RFQ: 1) Company information; 2) Technical Competence; and 3) Project & Account Management Approach. We will use the information you provide, as well any direct experience that NEEA has with your organization to assess the fit of your organization with NEEA.

5.1 Cover Letter

Include a 1 to 2-page overview that describes:

- Which of the broad areas (impact/process evaluation, measures analysis and/or modeling assistance) for which you intend to submit qualifications.

- The organization’s history, highlighting experiences and core competencies. Explain why your organization is a good fit with the needs outlined in this RFQ.
- Please provide a summary of your organization’s experience with utilities, energy efficiency and energy efficiency resource planning as it relates to the three broad work areas described above.
- Feel free to highlight areas that you believe you are qualified in a way that represents a competitive advantage over other vendors in terms of technical competence (i.e., methodologies; data collection and analysis approaches; modeling and simulation expertise; evaluation, research and sample design; logic model development & review, etc...).
- Finally, please share your approach for maintaining and continually improving your organization’s ability to meet the needs of its clients.

5.2 Key Information

Include a document of no more than 12 pages that addresses the following requests:

Technical Competence: Please provide evidence of your organization’s competence in executing the tasks within the three broad work areas above. Your submission can address all three areas, but it is completely acceptable to include just a subset.

We suggest including:

- 2-4 summaries of projects that you have completed in the past 1 – 2 years. The projects highlighted should demonstrate the depth and/or breadth of your expertise. Each summary might include:
 - Background (project justification, objectives and type of work) and logistics (duration, budget, number of employees/sub-contractors involved, markets, products, etc...)
 - Summary of the key methods for design, data collection and analysis
 - For at least 1 project summary we would like you to include a description of a major obstacle you overcame, or problem you solved – tell us how you discovered, communicated and addressed the obstacle or problem
 - A few key results, and how those results were used by the client
 - Link to the report, or portions of the report (to be included in the appendix) that demonstrate your ability to leverage visualization techniques to communicate ideas; synthesize key findings into relevant conclusions and/or indicated actions; and are designed to be readable by a wide audience.

Project & Account Management: Please explain how your organization structure enables best-in-class project and account management.

5.3 The Appendix

Please include the following documentation in the appendix:

Section 1: Company Information

- Up to 10 1-page bios of those who would be most likely to be assigned to the NEEA team based on the type of work we are requesting. Please include the role that each of these individuals would play on any given project (i.e., project manager, data analyst, etc...). This list is not intended to reflect the only people that may be assigned to a NEEA project, although we would expect that in most cases you would assign either these people or people with similar skills and experience. We

will use these bios to gain a better understanding of the depth and breadth of your staff's skills and experience relative to our needs.

- Organization chart, highlighting who NEEA's key contact(s) should be when initiating a limited RFP.
- Rate sheets and/or fee schedule for services rendered
- Documentation reflecting your organization's good financial standing, such a Dun & Bradstreet report.

Section 2: Key Information

- Reports or other sample deliverables referred to in the **Technical Competence** section of Key Information. Please note that you do not have to submit an entire report. The purpose of the deliverables submission is to help us assess how well your report writing fits with our report guidelines, so we encourage you to submit specific portions of reports that demonstrate your ability to meet NEEA's market research and evaluation report guidelines. To see our report guidelines, click the link:

<http://neea.org/docs/default-source/contracts-documents/neea-report-guide.pdf?sfvrsn=14>

- A list of awards and/or formal industry recognition received in the past 3 years

6 Miscellaneous

NEEA is under no obligation to enter into a contract with any qualified respondent, nor is there any obligation or intent implied to reimburse any party for the cost of preparing statement of qualification in response to this RFQ.

7 RFQ Schedule

If you have clarification questions prior to putting together your submission document, please take the following steps:

- Send one email with your intent to bid and any clarifying questions by no later than November 20, 2017.
- NEEA will create one document that answers all questions and send it to those who asked questions by November 27, 2017.

Statements of qualification shall be submitted to the RFQ Point of Contact listed below in electronic format no later than December 24, 2017.

Bidders will be notified by January 31, 2018 if NEEA will include you in the qualified vendor list.

We intend to update at least some of this information (such as bios, rate sheets, etc..) on an annual basis.

All correspondence, including but not limited to, questions and submissions shall be directed via email to:

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