

Request for Proposals: RFP #50469 Ductless Heat Pump Program Implementation



Northwest Energy Efficiency Alliance (NEEA) is soliciting proposals for program support and implementation of NEEA's Ductless Heat Pump (DHP) Program that will result in direct and measurable electric energy savings. Work awarded through this RFP will extend from February 2018 through March 2019 with the option to renew for up to two (2) additional years at NEEA's option.

NEEA is soliciting proposals for DHP Program support for the following Areas of Work:

1. Program Coordination
 - a. Program delivery
 - b. Stakeholder coordination
 - c. Manufacturer engagement
 - d. Data management and reporting
 - e. Pilot and cost containment strategy coordination
 - f. Marketing support

2. Training and Technical Support
 - a. Distributors/installers training and support
 - b. Cost containment market intervention strategy training and technical support
 - c. Non-traditional contractor training and support
 - d. Community Partner training and support
 - e. QA/QC

3. Supply Chain Development Area 1
 - a. Mid-stream cost containment market intervention strategy and execution
 - Regional pilot participation recruitment and partner management
 - Non-traditional installer recruitment and support
 - Community partner recruitment and support

4. Supply Chain Development Area 2
 - a. Retail channel development

Bidders may submit proposals for more than one Area of Work. Each Area of Work bid upon must be prepared in separate proposals. Each proposal for all bid-upon Areas of Work must be clearly labeled and submitted to NEEA as one bid package. The key dates for this RFP are as follows:

- Bidders must submit an "Intent to Respond" form for each Area of Work intended to be bid on, along with any bidder questions by **5:00 p.m. PST, October 6, 2017**.
- Pre-Bid Webinar will be held **10:00 a.m. – 11:00 a.m. PST, October 11, 2017**.
- Electronic proposals must be received by no later than **5:00 p.m. PST, October 27, 2017**.

Direct all communication regarding this RFP to: sasmus@neea.org

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1 Introduction

About the Northwest Energy Efficiency Alliance

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

About this Request for Proposals (RFP)

NEEA is seeking qualified Contractors to implement NEEA's DHP Program February 2018 through March 2019 with the option to renew for up to two (2) additional years as future scope and budgets are confirmed. This "umbrella" RFP covers four DHP Program Areas of Work. Bidders may submit proposals for one or more of the Areas of Work as outlined in Section 5 (Scope of Work).

It is mandatory each proposal submitted be a stand-alone response conforming to the format outlined in Section 8.4 (Proposal Format) of this RFP. Proposals may be evaluated by NEEA staff, as well as, external subject matter experts for each Area of Work.

2 Background

The goal of NEEA's DHP Program is to create lasting market transformation for DHPs by placing the region on a trajectory to achieve 65% penetration of existing single family zonally heated electric resistance homes by 2040. NEEA estimates there are currently 505,066 of these homes in the Northwest.

In October 2008, NEEA and the Bonneville Power Administration (BPA) launched the NW Ductless Heat Pump Project, a regional pilot program aimed at demonstrating the use of inverter-driven ductless heat pumps (DHP) to displace electric resistance heat in existing Northwest homes.

In 2014, NEEA expanded the target market for the DHP Program from single family zonally heated electric resistance homes to include single family electric forced air furnace heated homes and manufactured homes. NEEA estimates there are over one million electrically heated homes in the Northwest region.

From the Program launch through the end of 2016, almost 60,000 DHPs were installed in single family zonally heated electric resistance homes (approximately 12% market penetration) and evaluation activity continues to assess the energy savings potential, market barriers, and non-energy benefits associated with DHPs.

More than 100 utilities are offering DHP programs for their customers. To support these efforts, NEEA focuses upstream to ensure affordable product availability, increase market awareness, and build capacity.

To support NEEA’s market transformation efforts, the following objectives are overarching focus areas for the DHP Program:

- Increase consumer awareness and adoption of the technology in the defined target markets
- Drive down product and installation costs to achieve greater affordability
- Increase adoption of the 1:1 displacement method
- Development and adoption of variable capacity heat pumps rating/testing procedure

3 Definitions and Applicable Documents

Acronym / Term	Definition
Bidder(s)	Those who respond to this RFP
BPA	Bonneville Power Administration, (a NEEA funders)
Contractor(s)/Contractor Team	The firm(s) which is awarded the work outlined in this document
Distributors	Mid-stream actors who supply retailers and installers with DHPs
Funding Utilities (utilities)	Northwest utilities (in, Idaho, Montana, Oregon and Washington) funding NEEA to achieve energy savings targets in 5 year cycles
DHP	Ductless Heat Pump
HVAC Companies	Heating, ventilation and cooling installers operating in the Northwest
Manufacturers	Producers of ductless heat pump technologies.
NW Ductless Heat Pump Project (NWDHPP)	Market facing name of NEEA’s DHP Program
NEEA	Northwest Energy Efficiency Alliance
Region	NEEA’s region includes Oregon, Washington, Idaho and Montana
RFP	Request for Proposal
RTF	Regional Technical Forum. To learn more, visit the RTF’s website or review presentation here .

Program-related Resources:

- [NW Ductless Heat Pump Program Website - GoingDuctless.com](#)
- [NW Ductless Heat Pump Project Oriented Contractor List](#)
- [Regional Utilities with DHP Programs](#)
- [NW Ductless Heat Pump Project Initiative Market Progress Evaluation Report #5 \(2016\)](#)

- [NW Ductless Heat Pump Project Initiative Market Progress Evaluation Report #4](#) (2015)
- [Consumer Messaging for Ductless Heat Pumps and Heat Pump Water Heaters](#) (2015)
- [NW Ductless Heat Pump Project Initiative Market Progress Evaluation Report #3](#) (2014)
- [Final Summary Report for the Ductless Heat Pump Project and Process Evaluation](#) (2014)
- [Ductless Heat Pump Impact & Process Evaluation: Field Metering Report](#) (2012, Updated 2013)
- [Ductless Heat Pump Impact & Process Evaluation: Billing Analysis Report](#) (2013)
- [Regional Building Stock Assessment: Manufactured Home Characteristics and Energy Use](#) (2013)
- [2011 Regional Building Stock Assessment: Single-Family Characteristics and Energy Use](#) (2012)
- [NW Ductless Heat Pump Pilot Project: Market Progress Evaluation Report #2](#) (2012)
- [Northwest Ductless Heat Pump Pilot Project: Market Progress Evaluation Report #1](#) (2011)
- [Northwest Ductless Heat Pump Pilot Project Market Progress Evaluation Report #2](#) (2011)
- [Northwest Ductless Heat Pump Pilot Project, #1](#) (2010)
- [Residential Ductless Heat Pump Market Research & Analysis](#) (2008)

4 Objectives

Program Objectives

The following 2018 program objectives support NEEA's long term DHP Program goal of placing the region on a trajectory to achieve 65% penetration of existing single family zonally heated electric resistance homes by 2040:

1. Increase consumer awareness and adoption of the technology in the defined target markets
 - a. Increase year over year sales of DHPs in the region
 - b. Increase year over year percent of rebates going to 1:1 DHP systems rather than multi-head
 - c. Develop new consumer awareness and valuation tools and deploy them to reach consumers
 - d. Develop partnerships with community and advocacy groups whose constituency would benefit from DHP displacement and provide them tools and training to communicate the benefits and maintain consumer protection.
2. Drive down product and installation costs to achieve greater affordability
 - a. Deliver regional pilot program(s) aimed at reducing installation cost to customers that can be scaled and launched as long-term approaches to reducing costs

- b. Complete Quick Connect product study, deliver recommendations to the region and launch support for expansion of these products if backed by the of the study
 - c. Develop and disseminate/deploy price transparency tools for consumers
- 3. Increase supply chain adoption of the 1:1 displacement method
 - a. Support and help recruit and train non-traditional installation partners who focus on 1:1 displacement and lower cost installations
 - b. Continue to pursue retail channel opportunities
- 4. Development and adoption of variable capacity heat pumps rating/testing procedure
 - a. Support the development of the new rating/testing procedure.
 - b. Influence manufacturers to invest in gaining a rating for their products by 2019.
 - c. Educated utilities and supply chain on the new rating.
 - d. Work the Regional Technical Forum (RTF) and other regional specification-setting bodies to begin transitioning to requirements to new rating in 2019.
- 5. Utility Stakeholder Activities
 - a. Support NEEA funders to help maintain the viability and success of utility DHP incentive programs

RFP Objectives

The purpose of this RFP is to solicit proposals from qualified Contractor(s) to provide services for NEEA's DHP Program. Marketing activities related to NEEA's DHP Program are outside the scope addressed in this RFP and will be performed by a marketing contractor to be selected through a separate RFP process.

Selected Contractor(s) will work with NEEA, on behalf of NEEA's funding utilities, to design and implement strategies to accelerate the adoption of DHPs primarily in existing single family zonally heated electric resistance homes, placing the region on a trajectory to achieve 65% penetration of by 2040, and secondarily to accelerate the adoption in the expanded target markets.

NEEA encourages respondents to bid on one or more of the Areas of Work listed below and described in Section 5 (Scope of Work). NEEA is open to multiple contracting scenarios: contracting with one Contractor for each Area of Work; contracting with a prime Contractor supported by subcontractors; contracting with one Contractor for multiple Areas of Work, etc. We request bidder's structure their proposal to balance program management efficiency and subject matter expertise.

Through this RFP, NEEA seeks to select a Contractor, or several Contractors to support the following four Areas of Work. For each Area of Work, bidding Contractor(s) should at a minimum possess the following:

- 1. Program Coordination:** Working knowledge and understanding of NEEA, Northwest utilities, Bonneville Power Administration (BPA), Energy Trust of Oregon, and other relevant national actors to provide strategic guidance, design and coordination of DHP Program.
- 2. Training and Technical Support:** Possess a deep understanding of contractor/installer sales process and trends, adult learning processes,

methodologies and practices to provide technical support and training. Established relationships with community service and outreach groups assisting members with home improvements focused on energy efficiency, health improvements and utility bill reduction. Understanding of DHP technology and its value proposition is a plus.

3. **Supply Chain Development 1:** Established relationships with key regional and national market partners in the established DHP supply chain and in potential emerging partnerships including:
 - a. Distributors
 - b. Installers
 - c. Non-traditional installers (electricians, plumbers, home improvement contractors)
 - d. Community partners (Community Action Partnerships, Tribes)
4. **Supply Chain Development 2:** Established relationships with key regional and national retail partners

5 Scope of Work

NEEA values a collaborative environment and encourages respondents to incorporate their creativity and experience from other DHP-related work and energy efficiency programs into their approach to the below activities and deliverables. Much of the requested work performed by the selected Contractor(s) will require collaboration with NEEA's utility funders and other market actors. All market facing communications and engagement will be reviewed and approved first by NEEA Program Manager before being implemented. Proposals should be structured around the activities and deliverables below. Finally, NEEA encourages bidders to propose additional strategies to drive adoption of DHPs as displacement heating and cooling in target market homes as applicable.

Project Management (applicable to each Area of Work)

Project Management Overview:

For each Area of Work, selected Contractor(s) will be responsible for the following project management activities and deliverables in addition to the specific activities and deliverables outlined in each Area of Work below. Therefore, all budgets submitted for each of the four Areas of Work should include project management support.

Project Management Activities:

Project Management in each Area of Work will include the following:

1. Coordinate and participate in various internal and external meetings, including NEEA program team, marketing team, evaluation team and market partner meetings.
2. Coordinate with NEEA Program Manager to ensure high levels of coordination with utility partners to deliver specific activities and communications to support program goals.
3. Provide data for NEEA Market Research & Evaluation efforts, as requested.
4. Manage subcontractors, if applicable.
5. Ensure consistent delivery of NEEA's DHP Program activities, as determined by NEEA and outlined in annual work plans.

6. Achieve cost savings, economies of scale and streamlined creation, review and implementation processes across all activities outlined in this RFP.

Project Management Deliverables:

1. Detailed annual work plan and budget approved by NEEA Program Manager using NEEA provided Word and Excel templates or similar format (annually).
2. Monthly program activity report, to include utility stakeholder coordination summary, market partner engagement summary and budget/financial reporting and progress toward work plan objectives (by the 10th of each month).
3. Monthly invoice (by the 5th of each month).
4. Feedback and insights to be incorporated into NEEA's strategic plans (annually, as needed)
5. Quarterly financial forecasts by task (updated with each monthly report).
6. Mid-year DHP Program review, completed.

Area of Work 1: Program Coordination (including: Program Delivery, Stakeholder Coordination, Manufacturer Engagement, Data Management, Pilot and Cost Containment Strategy Coordination, and Marketing Support)

Program Coordination Overview:

Contractor shall provide DHP Program coordination services and is responsible for day-to-day activities, including but not limited to program delivery, stakeholder coordination, manufacturer engagement support, data management, coordination of cost containment strategies, and support of marketing, technical, training, and supply chain development activities.

Program Coordination Goals:

To support NEEA's DHP Program, the following objectives have been identified as areas of focus for 2018:

1. Increase consumer awareness and adoption of the technology in the defined target markets
2. Drive down product and installation costs to achieve greater affordability
3. Increase adoption of the 1:1 displacement method
4. Development and adoption of variable capacity heat pumps rating/testing procedure
5. Provide utility support and collaboration to promote the success of their DHP rebate programs.

Program Coordination Activities:

1. Develop, refine and execute DHP Program strategies to achieve goals in close consultation with NEEA staff, utility stakeholders, state energy organizations and subcontractors.
2. Develop and implement stakeholder support tactics and communications. These activities and materials will support NEEA's Stakeholder Relations and Marketing Managers.
 - a) DHP Program updates, upcoming DHP Program activity and results.

- b) Cost containment activity participation support
- c) DHP educational and marketing resources for utility program staff
- 3. Provide support for DHP work group and other presentation opportunities.
- 4. Support existing DHP utility programs in the region and provide support to utilities with new DHP programs.
- 5. Monitor and report relevant factors in the DHP market such as supply chain strategies and engagement models, market demand changes, competitive landscape, new market research availability, etc. Analyze such factors and work with NEEA to refine or develop new strategies to meet overall Program goals and remove market barriers.
- 6. Listing and updating rebate and installer information on GoingDuctless.com.
- 7. Reduce DHP first-cost barriers by working with Areas of Work 2, 3 and 4 Contractors to oversee the development and execution of regional cost containment strategies and pilots that can be more widely deployed by utilities individually or collectively long-term.
- 8. Coordinate between utilities, manufacturers, distributors, retailers and installers as needed to ensure the success of cost reduction activities.
- 9. Support marketing strategies and activities as needed.

Program Coordination Deliverables:

- 1. Execute NEEA-approved agreements/contracts with partners to participate in market pilots to drive down product and installation costs (as needed).
- 2. Support marketing contractor with DHP promotion materials, including: web language, social media content, product images and FAQ for utility staff (as needed).
- 3. Attend stakeholder and supply chain meetings (as requested).
- 4. Program content updates to NWDHPP website updates (as necessary).
- 5. Collect, enter, clean, store and report all product, sales and incentive data in accordance with NEEA data management requirements (ongoing).
- 6. Support DHP work group meeting and other presentation and meeting support (minimum quarterly).
- 7. Provide comprehensive data tracking and reporting of program pilot activities and results, specifically including reporting of participation, number of units sold and budget expenditures to NEEA (minimum monthly).
- 8. Track and report Program activities and expenditures in detail and in aggregate to assist with project status and management updates (monthly).
- 9. Support market progress evaluation reporting (as needed).

Area of Work 2: Training and Technical Support

Training and Technical Support Overview:

The selected Contractor(s) will use their technical and training expertise to develop DHP installer trainings and provide technical support. This work should involve an assessment phase to review the current DHP Program training and identify and implement improvements as necessary. After initial assessment of the NWDHPP installer training, selected Contractor(s) will work with Area of Work 3 contractor to develop and execute strategies for: 1) Recruiting, educating and training from a non-traditional installer base, 2.) Recruiting, educating and training community partners serving populations in the identified

target markets, 4) Educating utility program staff, supply chain and regional specification-setting bodies on the new rating/testing procedure and 5) mapping NEEA's exit from the DHP Program and long term transfer of training and technical support to the market and utilities, to be approved by NEEA. The selected Contractor will also deliver trainings.

Currently, NEEA is transferring live installer training webinars to an online learning management system (LMS) to enable on-demand training. In addition, the NWDHPP continues to deliver in-person trainings in collaboration with utility- and distributor-hosted contractor meetings.

The key target audience for installer trainings is HVAC installers, electricians, plumbers, home improvement contractors, company staff, distributors and community partners. Secondary target audience may include utility staff, retail staff, regional specification-setting bodies' staff, and others yet to be identified. Training curriculum content and technical resources will be based on best practices identified during the review/assessment phase. Contractor(s) may also provide technical assistance on an as needed basis, such as responding to technical DHP-related inquiries by phone, email and in-person. Contractor(s) will also support NEEA DHP RTF efforts as needed.

Training and Technical Support Goals:

1. Assess and update current NWDHPP DHP installer training.
2. Build strong technically capable regional supply chain of DHP installers.
3. Develop new installer networks who can drive lower install costs
4. Gain regional adoption of new heat pump rating/testing procedure
5. Set in place long term plan for NEEA exit from regional technical and training ownership and delivery

Training and Technical Support Activities:

1. Coordinate closely with Areas of Work 1, 3 & 4 Contractors.
2. Assess NEEA's current DHP training materials, resources and content. Identify resource gaps and opportunities to enhance, revise and update existing material and create new material focused on new recruiting targets audiences. Include deployment and delivery methods, and opportunities for improvement.
3. Create a technical training outreach plan based on the assessment that focuses primarily on newly identified target audiences and resources necessary to accelerate the adoption of DHPs in target markets.
4. Deliver DHP trainings to market partners through various channels depending on the target audience.
5. Reduce DHP product and installation costs by working with Areas of Work 1, 3 and 4 Contractors to oversee the development and execution of regional pilots aimed at testing cost-reduction strategies that can be more widely deployed by utilities individually or collectively long-term.
6. Perform QA inspections with for pilots, and for new installation and community partners and upon utility request, including the following QA activities:
 - a) Collect utility QA data as approved by NEEA.

- b) Continuously refine QA protocol and technical resources to respond to installation trends.
 - c) Coordinate utility QA engagement with market, community and utility partners.
7. Share installation trends and concerns with manufacturers to influence incorporation of best practices into installation materials.
 8. Respond to technical DHP-related inquiries by phone, email and in-person.
 9. Participate in RTF technical process if necessary.
 10. Provide technical support about DHPs as requested.
 11. Complete, collect and analyze DHP technical data as requested.
 12. Leverage market partner training infrastructure to deliver supply chain orientation trainings and presentations as necessary to support DHP Program.
 13. Create a long-term strategy for NEEA to exit from providing regional technical and training ownership and delivery.

Training and Technical Support Deliverables:

1. New and/or enhanced training content and materials, based on learnings from market assessment and training assessment.
2. Implement technical trainings to market as defined by training assessment and outreach plan (as needed).
3. QA inspections and services, up to 100 inspections.
4. Report QA results and data to NEEA (frequency to be determined by pilot team).
5. Technical support and response provided to all daily inquiries within 48 hours of receiving them (ongoing).
6. Technical resources to DHP team to support RTF work as necessary (ongoing).
7. Ensure newly trained installers are added to the NWDHPP Installer Finder by coordinating updates with Area of Work 1 Contractor (ongoing).
8. Support market progress evaluation reporting (as needed).

Area of Work 3: Supply Chain Development 1 (Cost Containment Market Intervention Strategy and Execution)

Supply Chain Development 1 Overview:

Selected Contractor will be responsible for developing, executing and providing support to the DHP supply chain cost containment market intervention strategies in the activities and deliverables below.

Supply Chain Development 1 Goals:

1. Develop and implement activities that build and support a competitive and skilled supply chain through engagement with distribution channels, installers, community organizations and other market partners.
2. Coordinate necessary manufacturer engagement with Area of Work 1 Contractor.
3. Work with supply chain to facilitate increased adoption of DHP displacement method in target market homes.

4. Drive installation costs down by testing market intervention strategies

Supply Chain Development 1 Activities:

1. Coordinate closely with Areas of Work 1, 2 and 4 Contractors.
2. Create a community partner and non-traditional installer recruitment and support plan that focuses primarily on newly identified market partners and resources necessary to accelerate the adoption of DHPs in target markets.
3. Reduce DHP first-cost barriers by working with Areas of Work 1, 2 and 4 Contractors to oversee the development and execution of regional pilots aimed at testing cost-reduction strategies that can be more widely deployed by utilities individually or collectively long-term.
4. Explore methods and provide ongoing recommendations for activities to drive down product and installation costs throughout supply chain.
5. Promote DHP supply chain employee education to increase product knowledge, acceptance and adoption of 1:1 displacement method in the appropriate application.
6. Promote manufacturer testing to the variable capacity heat pumps rating/testing procedure and its availability in the market via standard and developing DHP distribution channels.
7. Monitor federal and local standards and code issues and opportunities, and provide support and communication regarding codes and standards.

Supply Chain Development 1 Deliverables:

1. Community partner and non-traditional installer recruitment plan that focuses primarily on newly identified market partners and resources necessary to accelerate the adoption of DHPs in target markets.
2. Attend/coordinate meetings and events to recruit, educate, train and support new supply chain partners (ongoing).
3. Supply chain bulletins and newsletters (minimum quarterly).
4. Content for supply chain educational materials (develop as needed with Contractors for Areas of Work 1, 2 and 4 and Marketing).
5. Recommendations to NEEA ensuring local codes do not create barriers to installation (ongoing).
6. Collaborate with Market Research and Evaluation contractor on research pertaining to tracking the market share of emergency versus planned replacements and other market progress evaluation reporting research (as needed).

Area of Work 4: Supply Chain 2 (Retail)

Supply Chain Development 2 Overview:

NEEA considers the retail channel as an unrealized opportunity for greater DHP sales, increased price transparency for consumers, and increased consumer familiarity with the product. Retailer relationships and engagement strategies have thus far proved difficult to advance. The selected Contractor shall work with NEEA to cultivate ongoing relationships with key retailers at national and local levels to encourage active collaboration on retail tactics to achieve channel goals.

Supply Chain Development 2 Goals:

1. Develop and implement activities that build and support strong relationships with national and local retailers to increase sales and drive down product and installation costs through retail channel.
2. Work with retailers to increase visibility of product in stocking practices, retail staff knowledge and promotion of the product, and efficient and transparent installation process and cost.

Supply Chain Development 2 Activities:

1. Develop a retail engagement plan.
2. Promote DHP retail employee education to increase product knowledge, acceptance and adoption.
3. Explore methods and provide ongoing recommendations and activities to decrease DHP product costs at retail.
4. Monitor stocking and flooring of DHPs at retail. Associated activities should encourage stocking and flooring DHPs at retail and to ensure regional availability of rebate-qualified DHPs.
5. Work with retail partners to reduce barriers to cost competitive installations through the retail channel.
6. Amplify retailer capacity and mid-stream intervention strategies to maximize sales through the retail channel.
7. Create strategy to drive DHP sales at retail level.

Supply Chain Development 2 Deliverables:

1. Retail engagement plan.
2. Meetings and events with retailers to discuss installation process improvements, staff education, and flooring and stocking practices and opportunities. (ongoing).
3. Content for retail sales associate educational materials (as needed).
4. Support market progress evaluation reporting (as needed).

Marketing

Marketing services for this RFP will be managed by a separate marketing contractor. The Contractor(s) selected under this RFP will be expected to coordinate closely with the marketing contractor on activities that have marketing and communication components.

6 Contractor Qualifications

NEEA encourages proposals from all firms with relevant experience and from teams of experienced contractors with a track record of working together to meet or exceed the goals of assigned programs and/or projects. The winning bidder(s) needs to demonstrate a thorough understanding of utility programs, particularly in the Northwest, and the capacity to execute items outlined in the appropriate sections of this RFP. **The following qualifications are preferred, but may not be integral for each individual area of work:**

1. Knowledge of the DHP market including barriers to product adoption, leverage points, influencers and market trends.

2. Subject matter expertise in retail product sales strategies.
3. Technical and training expertise to provide technical support.
4. Strong relationship management skills to develop and support strategic market partner engagement.
5. Strategic development capabilities to support data-driven program planning.
6. Highly creative and innovative to solutions to move the market.
7. Knowledge of the region’s utility industry and residential programs and experience delivering programs in residential HVAC and DHP technology.
8. Demonstrated experience working with utility managers and program staff.
9. Demonstrated experience working and collaborating with other individual contractors be or other contractor teams.
10. Demonstrated experience working with community organizations.
11. Excellent communication practices and outputs, producing consistently professional deliverables, via both written and verbal forms.

7 Product Quality

All activities need to be approved by NEEA before execution. NEEA requires adherence to the following standards: Resources, tools and associated communications must be of excellent quality and sufficient to serve as reusable resources by the Northwest region. “Excellent quality” includes but is not limited to: factual accuracy, relevance to target audience/s, communication impact, visual appeal and measurability.

8 Proposal Submission

Bidders shall submit the proposal electronically no later than 5:00 p.m. on the day listed in the RFP Schedule below. Hardcopies are not required but will be accepted and must also arrive to NEEA offices by 5:00 p.m. on the day listed in the RFP Schedule below.

8.1 RFP Schedule

Date Date(s)	Time Due	Item
Monday, September 25, 2017		RFP released
Friday, October 6, 2017	5 p.m. PST	Intent to Respond and Bidder Questions due
Wednesday, October 11, 2017	10 a.m. PST	Pre-bid webinar and response to questions
Friday, October 27, 2017	5 p.m. PST	Written proposals due to NEEA
November 7 – 9, 2017		Finalist presentations/interviews
Tuesday, November 14, 2017		Contractor(s) selected
November 2017- January 2018		Contract negotiations and Execution
Thursday, February 1, 2018		Estimated work start date

8.2 RFP Point of Contact

Direct all correspondence, including but not limited to, questions and submissions to:

Suzi Asmus
 Program Manager, Residential
 Northwest Energy Efficiency Alliance
 421 SW 6th Avenue, Suite 600
 Portland, OR 97204

Phone: 503-688-5407
E-mail: sasmus@neea.org

8.3 Intent to Respond

All “Intent to Respond” forms (provided in Appendix A) must be received electronically no later than by the end of business day listed in the RFP Schedule.

Only those parties submitting the “Intent to Respond” form will be provided with updates to the RFP, have questions responded to and have their proposals considered.

8.4 Proposal Format

1. **Cover Letter (1-page maximum)** – Include an overview of your organization, including company mission and values as well as why you feel your organization is best suited to conduct the work envisioned under this solicitation.
2. **Executive Summary (2-page maximum)** – Include the key strategies and approach to completion of the scope of the work; proposed costs; and the reasons NEEA should select your team.
3. **Introduction (1-page maximum)** – Describe your understanding of the program, the market barriers to standard business practice adoption and any unique perspective.
4. **Proposed Implementation Strategy (3-page maximum per Area of Work)** – Provide information regarding specific methodologies and approach to be undertaken to complete the scope for **each Area of Work** that you are bidding on **as outlined in Section 5**. Be sure to include project management activities in proposed implementation strategy as well.
5. **Project Team Identification (2-page maximum per Area of Work)** – Include information about program team members and team structure, past team efforts on similar work, years of experience and other relevant qualifications.
6. **Timeline (2-page maximum)** – Provide information on approach to completing the work as stipulated in Section 6 “Scope of Work” and within the timeline prescribed.
7. **Cost Estimate (2-page maximum)** – Provide cost breakdown by task and rate sheet for the contracted period. (See Appendix B for requested format.)
8. **Appendix (6-page maximum)** – Appendices may include information on staff and firm qualifications, references for similar work conducted, links to case studies, etc.

9 Selection

9.1 Scoring

Bidding firms will be rated, among other evaluation criteria, in terms of:

1. Responsiveness to the RFP and demonstrated understanding of the issues surrounding the project.

2. The thoughtfulness and appropriateness of the proposed methodology to accomplish the desired results of the project.
3. The experience and qualifications of the individuals specifically proposed to execute and manage the project. (Note: Proposed staffing is a significant factor in bidder selection. As such, no changes in key staff / substitutions or changes in roles/responsibilities can be made without the written agreement of NEEA project manager.)
4. The experience of the firm or team of firms making the proposal.
5. The capability to execute the plan, including past experience and aptitude for collaboration.
6. The cost of the contract should be bid as Time & Materials on a not to exceed basis. The level of effort and time devoted by key staffers will be a consideration.

NEEA is under no obligation to select any proposal that results from this solicitation, nor is there any obligation or intent implied to reimburse any party for the cost of preparing a proposal in response to this RFP. NEEA encourages bidders to submit proposals that include innovative methods or tasks in addition to or different from those listed in the RFP.

10 Insurance/Warranties

Without limiting any liabilities or any other obligations of Contractor, Contractor shall, prior to commencing work, secure and continuously carry with insurers having an A-rating (or better) from A.M. Best Company the following minimum insurance coverage:

10.1 Commercial General Liability insurance

With a minimum single limit of \$1,000,000. The coverage shall include:

1. Bodily Injury and Property Damage Liability;
2. Contractual Liability;
3. Products and Completed Operations to protect against and from all loss by reason of injury to persons or damage to property, including all third persons, and property of NEEA and all third parties based upon or arising out of Contractor's operations hereunder, including the operations of its subcontractors of any tier.

10.2 Business Automobile Liability insurance

With a minimum single limit of \$1,000,000 for bodily injury and property damage with respect to Contractor's vehicles, whether owned, hired or non-owned, assigned to, or used in the performance of the Tasks.

Appendix A - Intent to Respond Form

RFP #: **50469**

Project Title: **Ductless Heat Pump Program Implementation**

NEEA Point of Contact: Suzi Asmus sasmus@neea.org

PLEASE PROVIDE THE FOLLOWING:

Company	
Address	
City, State, Zip	
Contact Name	
Contact Title	
Phone #	
Fax #	
E-mail	

Indicate Areas of Work for which your organization will submit RFP responses:

- _____ Area of Work 1: Program Coordination
- _____ Area of Work 2: Training & Technical Support
- _____ Area of Work 3: Supply Chain Development Area 1
- _____ Area of Work 4: Supply Chain Development Area 2

The company named above intends to submit a proposal in response to NEEA’s request for proposal listed above. Deadline for submitting the “Intent to Respond” form is end of business day of date listed in the RFP schedule.

Signature of authorized representative: _____

Print Name _____

Title _____

Date _____

Appendix B – Budget Table Example Format

<u>Task</u>	Key Staff Name	Key Staff Name	Key Staff Name	Key Staff Name	Direct Costs	Total (\$)
	Title	Title	Title	Title		
	Rate	Rate	Rate	Rate		
Task 1						
(List sub-tasks)						
Subtotal Task 1						
Task 2						
(List sub-tasks)						
Subtotal Task 2						
Task 3						
(List sub-tasks)						
Subtotal Task 3						
Task 4						
(List sub-tasks)						
Subtotal Task 4						
Task 5						
(List sub-tasks)						
Subtotal Task 5						
Task 6						
(List sub-tasks)						
Subtotal Task 6						
TOTAL						\$