



Request for Proposals:

RFP #43505

Market Channel Development for Condensing Rooftop Units

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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.

2 Background

NEEA's Natural Gas Portfolio is the first regional effort to drive natural gas market transformation in the country. This initial work will build experience in natural gas markets, leveraging NEEA's electric experience and driving toward a fully integrated approach to market transformation for the longterm benefit of the region. Key focuses of the Portfolio include investigating savings potential of emerging technologies and understanding barriers with existing energy efficiency gas technologies.

Commercial condensing rooftop units (RTUs) were identified as one of five technologies with market transformation potential in NEEA's 2015-2019 Natural Gas Business Plan. These condensing RTUs are available in the market and offer promising energy savings.

To better understand the regional potential of a condensing RTU program, NEEA completed a rooftop HVAC market characterization in its natural gas territory (Oregon, Washington and northern Idaho). Two of the identified market barriers include limited supply and low overall market awareness.

NEEA is seeking a qualified Contractor to build and develop rooftop HVAC supply chain partnerships, creating mutually beneficial relationships to ultimately advance the market adoption and uptake of condensing RTUs.

3 Objectives

The purpose of this RFP is to solicit proposals from qualified Contractors to provide program services for NEEA's condensing RTU program. The selected Contractor will work as a strategic partner on behalf of NEEA and its natural gas funding utilities to design and implement strategies that accelerate the adoption of condensing RTUs.

Through this RFP, NEEA seeks to select a Contractor with the industry expertise to support the following objectives:

- Develop relationships with key regional and national supply chain partners
- Expand understanding of market channel barriers
- Leverage existing relationships with regional or national commercial facilities to participate in pilot program testing RTU technology

To support NEEA's market transformation efforts, the following overarching objectives are focus areas for condensing RTU program activities:

- Educate RTU supply chain of the attractive value proposition of condensing technology and support with value selling techniques and materials

- Ensure supply of condensing RTUs meets the market needs, especially for replacement scenarios
- Engage with large retail building managers to present and/or demonstrate the condensing RTU value proposition and ultimately have them specify the technology for replacements or new construction

4 Definitions and Applicable Documents

Acronym/Term	Definition
Bidder	Those who respond to this RFP
Commercial Facilities	Facility candidates for efficient RTU technology
Contractor	The firm which is awarded the work
HVAC	Heating, ventilation and air-conditioning
Natural gas funding utilities	Avista Utilities, Cascade Natural Gas Corporation, Energy Trust of Oregon, NW Natural, Puget Sound Energy
NEEA	Northwest Energy Efficiency Alliance
RTU	Rooftop unit
Supply chain	Manufacturers, manufacturer reps, distributors, installers / contractors

Documents relating to program/natural gas portfolio

- [NEEA Rooftop HVAC Market Characterization Study](#)
- [NEEA 2015-2019 Natural Gas Business Plan](#)
- [NEEA 2017 Natural Gas Operations Plan](#)

5 Scope of Work

NEEA values a collaborative environment and encourages respondents to incorporate their creativity, relationships, and experience from other market-related work and energy efficiency programs into their approach. Much of the requested work, communication, and engagement performed by the selected Contractor will require NEEA Program Manager collaboration and approval prior to implementation. Proposals should be structured around the activities and deliverables below.

Task 1: Project Management

The selected Contractor will be responsible for the following project management activities and deliverables.

Activities:

- Coordinate and participate in various internal and external meetings, including NEEA program team, evaluation team, and market partner meetings
- Coordinate with NEEA Program Manager to ensure high levels of coordination with market partners to deliver specific activities and communications to support program goals
- Provide data for NEEA Market Research & Evaluation efforts, as requested
- Manage subcontractors (if applicable)

Deliverables:

- a) Detailed Work Plan and budget approved by NEEA Program Manager using NEEA Excel template or similar format
- b) Monthly program activity report, to include market partner engagement summary and budget/financial reporting, forecast to budget for remainder of contract, and progress toward Work Plan objectives
- c) Feedback and insights incorporated into NEEA's strategic plans (as needed)
- d) Updated work/project plans in response to changing market conditions and strategy (as needed)

Task 2: Supply Chain Partner Development

In coordination with the NEEA Program Manager and/or NEEA Product Manager, the selected Contractor will support and develop market partner relationships to drive adoption of condensing RTUs. Contractor will use a strategic approach to identify, target/recruit, and engage market partners regionally and nationally. Key market partners include but are not limited to supply chain actors, energy efficiency organizations, utilities, and governmental organizations.

Activities:

- a) Identify viable supply chain partners and associated distributor relationships
- b) Develop and execute market partner engagement strategy
- c) Communicate value proposition of NEEA to existing and potential market partners, increasing their participation in NEEA activities
- d) Perform market partner outreach to build product awareness and identify barriers to adoption
- e) Propose solutions to overcome supply, stocking, and other identified market barriers to adoption
- f) Support market partner inquiries by email, phone, and in-person communication

Deliverables:

- a) Market partner engagement strategy
- b) Business case/value proposition documents for targeted market partners
- c) Market barriers and intervention strategies recommendations
- d) Briefings, agendas, presentations in advance of market partner engagement activities
- e) Call reports, meeting summaries following market partner engagement activities

Task 3: Commercial Facility Strategy Development and Field Trial Recruitment

In coordination with the NEEA Program Manager and/or NEEA Product Manager, the selected Contractor will engage with commercial facilities and their purchasing managers to present pilot opportunities and demonstrate the value of condensing RTU technology.

Activities:

- a) Identify viable supply commercial facility partners and associated supply chain relationships
- b) Develop and execute commercial facility engagement strategy
- c) Perform market partner outreach to communicate NEEA value proposition, build product awareness, identify barriers to adoption

Deliverables:

- a) Commercial facility outreach strategy

- b) Recruit one commercial facility to commit to a field test

6 Contractor Qualifications

NEEA encourages proposals from all firms with relevant experience in achieving project goals. The winning bidder needs to demonstrate a thorough understanding of the commercial HVAC market and demonstrate the capacity to execute items outlined in this RFP.

Bidders with the following qualifications are encouraged to bid on this work:

- Knowledge of and/or experience with the commercial HVAC industry, including technology, barriers to adoption of energy efficiency, ownership structures/business models, and leverage points
- Knowledge of and/or experience in implementing market transformation strategies
- Strong relationship management skills to develop and support strategic market partner engagement
- Demonstrated program administration capabilities sufficient to coordinate and deliver multiple simultaneous projects effectively
- Demonstrated ability to influence market partners to increase stocking practices, drive awareness of new technology and participate in product demonstration projects
- Excellent written and verbal communication practices
- Knowledge of and/or experience with condensing rooftop units (RTUs)

7 Proposal Submission

Bidder shall submit one (1) electronic copy of the proposal according to the RFP schedule below.

7.1 RFP Schedule

Date Due	Time Due	Item
4/12/17	--	RFP Released
4/21/17	5 pm PST	Intent to Respond submitted to RFP Point of Contact
4/21/17	5 pm PST	Bidder questions submitted to RFP Point of Contact
4/26/17	5 pm PST	Answers to questions emailed back to bidders
5/8/17	5 pm PST	Written proposals submitted to RFP Point of Contact
5/15/17	5 pm PST	Finalists chosen and contacted
5/22/17-5/25/17	--	Finalist presentations
5/31/17	5 pm PST	Contractor(s) selected and contacted
6/26/17	--	Estimated work start date

7.2 RFP Point of Contact

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

Selena Bell Heise
 Program Manager, Natural Gas
 Northwest Energy Efficiency Alliance
 421 SW 6th Avenue, Suite 600
 Portland, OR 97204
 Phone: 503-688-5400, ext. 5440
 Fax: 503-688-5447

E-mail: sheise@neea.org

7.3 Intent to Respond

All “Intent to Respond” forms must be received no later than by the end of business day as listed in the RFP Schedule.

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

7.4 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 RFP.
2. **Executive Summary (2 pages maximum)** – Describe your understanding of the scope. 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. **Proposed Implementation Strategy (5 pages maximum)** – Provide information regarding specific methodologies and approach to be undertaken to complete the objectives. Be sure to include project management activities in proposed implementation strategy as well.
4. **Project Team Identification (2 pages maximum)** – Include information about program team members and team structure, past team efforts on similar work, years of experience, and other relevant qualifications.
5. **Timeline (2 pages maximum)** – Provide information on approach to completing the work as stipulated in Section 5 “Scope of Work” and within the timeline prescribed.
6. **Cost Estimate (2 pages maximum)** – Provide cost breakdown by task and rate sheet for the contracted period. (See Appendix B for requested format.)
7. **Appendix (6 pages maximum)** – Appendices may include but are not limited to information on staff and firm qualifications, references for similar work conducted, links to case studies, etc.

8 Selection

8.1 Scoring

Bidding firms will be rated among others 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 Program 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.

9 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:

9.1 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.

9.2 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 #: **43505**

Project Title: Market Channel Development for Condensing Rooftop Units
NEEA Point of Contact: Selena Bell Heise

Deadline for submitting this “Intent to Respond” form is 5:00PM PST on April 21, 2017.

PLEASE PRINT:

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

The company named above intends to submit a proposal in response to NEEA’s request for proposal listed above.

Signature of authorized representative:	
Printed name of authorized representative:	
Title:	
Date:	

Please submit completed form to: Selena Bell Heise, shoise@neea.org

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						\$