

Request for Qualifications RFQ #50874

2018 - 2019 Marketing Services Open Submission RFQ



1 Introduction

The Northwest Energy Efficiency Alliance (NEEA) is a non-profit organization working to effect market transformation through the acceleration and adoption of energy-efficient products, services and practices. NEEA is an alliance of more than 140 Northwest utilities and energy efficiency organizations working on behalf of more than 13 million energy consumers. For more information, visit neea.org.

2 Background

The NEEA Marketing Team develops and implements marketing strategies in support of NEEA's market transformation programs, which accelerate market adoption of energy-efficient products, practices and services. These marketing strategies are core to NEEA's market transformation work and include both business-to-business and business-to-consumer strategies within the residential, commercial, and industrial markets.

NEEA program marketing activities take place in a complex environment involving multiple stakeholders, including NEEA's funders. Consequently, high levels of collaboration are required for planning and executing these activities. Substantial creativity is also required to generate marketing assets that, in some cases, must seamlessly complement our stakeholders' activities and materials.

3 Objectives

NEEA's Marketing Team maintains a short-list of qualified vendors, categorized by marketing competency. NEEA is seeking to expand its pool of qualified contractors to bid on various upcoming marketing projects. This Request for Qualifications (RFQ) is to identify qualified marketing vendors to add to NEEA's marketing vendor short-list. Short-list vendors are eligible to participate in streamlined proposal processes, and may be among the first or only vendors asked to bid on upcoming projects. Projects may include specific marketing activities or campaigns to further the overall market transformation goals of its residential, commercial, and industrial initiatives.

This is an open submission RFQ for which NEEA will be accepting solicited and unsolicited marketing qualification submissions through **December 31, 2019**.

4 Scope of Work

NEEA is seeking qualified vendors who have specialized and proven expertise in one or both of the marketing categories listed below. Responding agencies may select to provide qualifications for consideration as a short-list agency for one or both of the following competency categories. Vendors awarded projects will work seamlessly with NEEA's Marketing Team on these efforts:

1. Program Marketing Planning and Implementation (PMPI)

NEEA is seeking agencies with strong experience in marketing strategy development and execution to support its various initiatives. Activities could include, but are not limited to:

- a. Development of integrated marketing plans in coordination with NEEA's Marketing Team;
- b. Implementation of activities included in marketing plans, including digital and traditional marketing tactics;
- c. Brand and creative development, including graphic design, video, and print;
- d. Media planning and buying, PR/ Earned Media;
- e. Campaign tracking, measurement and reporting.

2. Website Development

NEEA develops and provides various websites and online tools across its residential, commercial and industrial programs (see betterbuiltinw.com, betterbricks.com, and goingductless.com for examples of current sites).

Development activities could include but are not limited to:

- a. Designing, developing, and/or maintaining new and existing websites and microsites;
- b. Enhancing and increasing existing website functionality, integration with partner sites, and user experiences;
- c. Editing and recommending content and design enhancements for improved UX and SEO/SEM;
- d. Developing and deploying minor client- and server-side code changes, including but not limited to HTML, HTML5, Ajax, JavaScript, .NET, Java, PHP;
- e. Identifying and tracking KPIs, benchmarking, and reporting.

5 Contractor Qualifications

Vendors should possess deep experience in all aspects of the marketing categories to which they intend to submit their qualifications. Such experience could include but is not limited to:

1. Marketing implementation experience. Specific experience with residential/commercial/industrial/energy efficiency projects is a plus. (PMPI)
2. Digital marketing expertise and a deep understanding of current trends and best practices. Expertise with multiple CMSs/platforms a plus. (PMPI/Website Development)

3. Expertise in B2B and B2C brand identity development and strategic market positioning. (PMPI)
4. Creative, versatile and effective design skills across digital and traditional media. (PMPI/Website Development)
5. Strong negotiation skills, and expertise in planning, buying, tracking and valuing media. (PMPI)
6. Expertise in analyzing data to develop decision-making tools for marketing activities (e.g., market segmentation, propensity models, web traffic behavior, etc.), and evaluating their impact. (PMPI/Website Development)

6 Qualification Submission

NEEA is accepting vendor qualification submissions on an ongoing basis through December 31, 2019.

To be considered for NEEA's vendor short-list, submissions shall follow the instructions below. One (1) electronic copy of the qualifications must be submitted to NEEA through the online submission form (located at <https://neea.org/marketing-rfq>). An optional hard copy may also be submitted in addition to the electronic copy, to the RFQ Point of Contact provided below.

Submissions may include qualifications for one or both categories of work. If your organization wishes to submit qualifications for both categories of work, a separate set of qualifications must be provided for each category within a single submission.

6.1 Process and Timeline

Received qualification submissions will be reviewed by the NEEA Marketing Team. A NEEA representative will respond to the agency contact provide in the submission within three (3) weeks of the submission date with a decision regarding the inclusion of your firm on our vendor short-list, or to obtain more information from your firm.

Should your firm be accepted for inclusion on our vendor short-list, you will be eligible to participate in streamlined proposal processes, and may begin receiving Requests for Proposals (RFPs) for projects that fall within the categories for which you were selected. In many cases, only other short-list vendors will be asked to respond to a given RFP.

NEEA regularly evaluates its short-list of vendors to ensure ongoing alignment with market changes and business needs. Approved vendors responding to this RFQ by the December 31, 2019 closing date will be short-listed for future Marketing work through December 31, 2020. NEEA may extend the duration of a vendor's short-list standing, at its discretion.

6.2 RFQ Point of Contact

All correspondence, included but limited to, questions and submissions shall be directed to:

Contact Name: Stephanie Lane,

Contact Title: Marketing and Corporate Communications Coordinator
Email: slane@neea.org
Phone: 503-688-5415
Address: Northwest Energy Efficiency Alliance
421 SW 6th Avenue, Suite 600
Portland, OR 97204

6.3 Qualifications Format

Note that one “page” is one side of a piece of paper of common size.

1. **Cover Letter (*limit 2 pages*)**: Include an overview of your organization, clearly identify which of the two categories for which your firm is submitting qualifications (you can submit qualifications for both categories), rationale as to why you feel your organization is a good fit and expected team composition. If a submission includes more than one agency, a demonstration of how these agencies will work seamlessly to provide streamlined services is required, and the submission should focus on whichever vendor will be primarily responsible for the work.
2. **Qualifications (*limit 3 pages per category*)**: Include at least three (3), but no more than four (4) case studies demonstrating your qualifications for each category in which you wish your firm to be considered. Providing links to online case studies or other projects that demonstrate your capabilities related to this project is acceptable. When applicable, case studies should include examples of the work completed and/or results/outcomes. Work examples may be submitted as appendices or hyperlinks.
 - a. For agencies responding to the Website Development category:
 - i. Identify all Content Management Systems or other web platforms with which you work;
 - ii. Identify all coding languages in which your agency is competent;
 - iii. Identify and/or distinguish the elements of development that you perform in-house from those you outsource to a partner.
3. **Appendix**
 - a. **Cost** – Sample project rates for the types of work outlined in the qualifications. NEEA is non-profit. Please note if you offer a non-profit discount.
 - b. **Example Work from the Case Studies**
 - c. **List of Relevant Clients** (current and/or past, but please note which)

7 Selection

7.1 Evaluation

Submissions will be evaluated in terms of:

1. Responsiveness to the RFQ requirements.
2. The experience of the firm(s) providing the qualifications.
3. Proven capability to execute similar work for other organizations.

NEEA is under no obligation to provide work to any agencies responding to 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 RFQ.

7.2 Preferred Insurance Coverage

Agencies interested in working with NEEA should be aware of the following insurance requirements for all NEEA vendors.

Vendors must maintain adequate and reasonable insurance covering their performance under any offered contract, including, but not limited to Commercial General Liability of at least \$1,000,000/occurrence, Business Automobile Liability insurance, and any workers' compensation and unemployment insurance required by law. Professional Liability insurance may also be required. NEEA may request a copy of such insurance policies prior to awarding work.

See sample terms and conditions for additional information about minimum insurance requirements: <https://neea.org/img/documents/sample-neea-contract-terms-and-conditions.pdf>.