



## Request for Consultant Proposals

### ***Lead a Working Group (WG) for Energy Reports***

**Issued by Efficiency Forward, Inc.<sup>TM</sup>:**

April 27, 2021

**Questions Due Before:**

May 14, 2021

**Proposals Due:**

May 24, 2021

## Efficiency Forward/DesignLights Consortium® Background

The DesignLights Consortium® (DLC) is a non-profit organization whose mission is to achieve energy optimization by enabling controllability with a focus on quality, people, and the environment. The DLC promotes high-quality, energy-efficient lighting products in collaboration with utilities and energy efficiency program members, manufacturers, lighting designers, and federal, state, and local entities. Through these partnerships, the DLC establishes product quality specifications, facilitates thought leadership, and provides information, education, tools, and technical expertise.

The DLC Networked Lighting Controls Technical Requirements ([NLC TR](#)) require energy monitoring in order to qualify a system on the DLC NLC Qualified Products List (QPL). Energy monitoring is defined in a manner similar to ASHRAE 90.1. The 90.1 definition was modified based on DLC stakeholder input.

The goals of the proposed working group (WG) are:

- To create a more detailed energy reporting template, acceptable to most or all participating DLC Member efficiency programs—so that DLC industry partners can use one template, rather than a different template for each different efficiency program; and
- To harmonize as feasible with existing standards.

## Project Objectives

1. Describe the minimum and optional contents, format, and semantic tags for energy reports produced by NLC systems, acceptable to participants in the DLC Working Group for Energy Reports; and harmonized as feasible with relevant documents from ANSI C136 and C137, Project Haystack, BRICK, ASHRAE 223P, ASHRAE 90.1, Green Button, DOE Energy Data Vault and SEED, etc.
2. Update the DLC NLC Technical Requirements (NLC TR) Tables EM-1 and EM-2 to reflect the outcome of the WG. Note that these tables are recommendations, not mandatory requirements—which might be developed into mandatory requirements sometime in the future.

## Services to Be Performed

Your proposal is expected to cover the following services:

### Month 1: Planning

- a. Project-manage this project, with input and guidance from DLC staff.
- b. Compose email invitation template and obtain approval from DLC staff.
- c. Engage WG participants. Start with draft list from the DLC, revise as needed to include relevant perspectives.
  - i. DLC Members (efficiency program managers and implementers) who use energy reports to incentivize networked lighting controls (NLC)
  - ii. DLC NLC industry partners who currently prepare different energy reports for different DLC Members

- iii. Additional perspectives as needed, including expertise in efficiency program EM&V (evaluation, measurement and verification), Project Haystack, etc.
  - iv. DLC non-member efficiency programs are specifically excluded, including AEP Ohio and ComEd.
- d. Schedule first two webinars with a tool such as Doodle.

### **Months 2 and 3: Lead four working group webinars**

- a. DLC staff will take raw notes at each webinar, participate in each webinar, and meet with you between webinars for planning.
- b. In your proposal, describe the agenda for each meeting plus any online engagement tools that will be used. How you will gather input from participants, discuss similarities and differences of participants' needs, address discrepancies, and document results?
- c. Distribute each webinar agenda one week before the meeting.
- d. Revise and publish minutes from each meeting.
- e. Between webinars, as needed, research to address questions raised, and create a presentation for the next webinar.
- f. The third webinar should present a draft proposal for discussion (new versions of Tables EM-1 and EM-2, plus additional text or tables as needed).
- g. The fourth webinar should present a revised proposal incorporating revisions to address the discussion in the third webinar.

## **Submittal Information**

### **Contact and Communications**

All communications between bidders and EF are to be directed to:

- Levin Nock, Senior Technical Manager, [lnock@designlights.org](mailto:lnock@designlights.org), 781-860-9177, ext. #154

### **Bidders' Questions & Responses**

Bidders may submit questions on this RFP via email. All questions submitted prior to **May 14, 2021** will be answered to the best of our ability.

### **RFP Submittal Deadline & Format**

Bidders are required to submit their proposal by **May 24, 2021** via email to Stephen White, Chief Operating Officer, [swhite@designlights.org](mailto:swhite@designlights.org).

- Proposals should be submitted in both Microsoft Word and PDF format.
- A confirmation of receipt will be sent to those who submit proposals on time.
- Late submittals will be rejected.
- Bidders are not required to submit print copies of their proposals.
- The transmittal letter contained in the proposal package must have an electronic signature and must be signed by a person who is authorized to bind the proposing firm.

EF reserves the right to reject as non-responsive any proposals that do not contain the information requested in this RFP. EF is not liable for any costs incurred by any person or firm responding to this RFP or participating in best and final interviews.

### **Milestone Schedule**

To allow adequate time for proposal submission and evaluation, the schedule below will be followed:

<b>RFP Issued</b>	April 27, 2021
<b>Questions due no later than</b>	May 14, 2021
<b>Proposals due</b>	May 24, 2021
<b>Anticipated notification to successful bidder</b>	June 4, 2021
<b>Anticipated contract start date</b>	June 14, 2021

### **Minimum Qualifications**

A single firm or a team of firms under a single primary contractor may submit bids. Key staff members must have demonstrated expertise in energy efficiency programs, facilitation, and semantic tagging of data related to commercial buildings. Also preferred expertise in EM&V 2.0 (evaluation, measurement, and verification) of energy savings. Changes in proposed key staff members may not be made during the execution of the work without written approval of EF.

### **Modifications to the RFP**

EF may modify the RFP prior to the proposal submission deadline by the issuance of an addendum to all parties who have submitted a notice of intent to bid by the required date.

### **Post Proposal Negotiation and Awarding of Contracts**

EF reserves the right to negotiate both price and non-price factors during any post-proposal negotiations with a finalist. EF has no obligation to enter into an agreement with any respondent to this RFP and may terminate or modify this RFP at any time without liability or obligation to any respondent.

### **Acceptance of Terms and Conditions**

EF will utilize its standard Consulting Agreement to contract for the services outlined in this RFP.

All proposals submitted to EF pursuant to this RFP shall become the exclusive property of EF and may be used for any reasonable purpose by EF.

### **Response Guidelines and Requirements**

Proposals should provide straightforward and concise descriptions of the bidder's ability to satisfy the requirements of this RFP. Omissions, inaccuracies, or misstatements will be sufficient cause for rejection of a proposal. Proposals not submitted as indicated may be rejected.

EF is looking for proposals demonstrating creativity, expertise, and experience in how bidders approach the work scope – not necessarily a detailed final approach. Once the consultant is selected, an initial task will be to review the scope and deliverables with EF and finalize a Scope of Services.

Bidders are requested to provide a concise yet complete description of the bidder's approach and capabilities for satisfying the required services outlined in this RFP. Excessive length is discouraged. In addition, bidders are encouraged to proactively present additional information and responses, not specifically requested, that help demonstrate understanding of this project's objectives and needs as well as bidder's creativity, experience, and/or expertise.

**Proposals must include the following:**

- Proposal Cover
- Signed Cover/Transmittal Letter
- Table of Contents
- Executive Summary
- Work Scope and Schedule
- Staffing and Subcontracting Plan
- Qualifications and Experience
- Budget and Billing Rates
- Exceptions to Contract Terms (if needed)
- Conflicts of Interest (if needed)
- Appendix – Resumes of Key Staff

The proposal cover must indicate the RFP name, the proposal date, bidder's name, and list of subcontractors. The transmittal letter must also state that the person signing the letter is authorized to commit the bidding organization to the proposed work scope, budget, and rates; that the information in the proposal is accurate; and that the proposal is valid for 90 days from the date of submittal.

**Supplier Diversity**

It is the policy of Efficiency Forward Inc. DBA DesignLights Consortium (DLC) to ensure full and equitable economic opportunities to all persons and businesses that compete for business with the DLC. To that end, the DLC's supplier diversity efforts are a key criterion in bid scoring.

Suppliers representing that they are diverse should be certified as such from a recognized certifying state and/or federal authority. For this purpose, the categories of diverse businesses include: Minority (MBE: African-American, Hispanic, Native American, Asian, Indian/Pacific), Women (WBE), Veterans (VBE-including Service Disabled), and Disadvantaged Business Enterprises (DBE/SDB). Such suppliers may be formed as a sole proprietorship, partnership, limited liability company (LLC), joint venture or corporation.

**Evaluation of Proposals**

EF will base their evaluation of proposals on the scoring matrix below. As noted above, the qualifications of key staff assigned to lead this project and the amount of time they commit to the project will be weighed heavily.

<b>RFP Evaluation Criteria/Scoring Matrix</b>
<p><b>Part A: General Approach</b></p> <ul style="list-style-type: none"> <li>• Proposal quality – comprehension and clarity regarding meeting project objectives and quality of proposed approach for meeting those objectives</li> <li>• Thoroughness and practicality of approach</li> <li>• Creativity of approach</li> </ul>
<p><b>Part B: Management Approach</b></p> <ul style="list-style-type: none"> <li>• Dedicated resources</li> <li>• Demonstrated management competence of key staff</li> <li>• Approach to use and management of subcontractors (if applicable)</li> </ul>
<p><b>Part C: Qualifications and Experience</b></p> <ul style="list-style-type: none"> <li>• Demonstrated competence and experience of key staff and firm(s)</li> <li>• References</li> </ul>
<p><b>Part D: Supplier Diversity</b></p> <ul style="list-style-type: none"> <li>• Demonstrated certification with MBE, WBE, VBE, DBE program</li> </ul>
<p><b>Part E: Cost</b></p> <ul style="list-style-type: none"> <li>• Total costs</li> <li>• Billing rates and direct costs/subcontractor mark-up rates (if any)</li> </ul>