



Request for Consultant Proposals

Light and Wellness Market Assessment

Issued by Efficiency Forward, Inc.TM

March 10, 2021

Questions Due on or Before

March 19, 2021

Proposals Due

March 29, 2021

Efficiency Forward / DesignLights Consortium (DLC)[®] 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.

Mission

The DLC mission is to achieve energy optimization by enabling interconnected solutions with a focus on quality for people and the environment.

Introduction

The DLC is seeking a consultant to characterize the LED light and wellness lighting market as it pertains to commercial applications. Light and wellness (L&W) lighting products are those designed and marketed to provide some circadian lighting attribute(s), such as a differentiated spectral power distribution, color tuning to support different time-of-day protocols, an optimized spatial distribution to increase vertical illuminance levels at the eye, and/or controllability to support one or more of these attributes. Lighting for wellness¹ is defined here, per IES TM-18-18, as optical radiation that stimulates the circadian, neuroendocrine, and neurobehavioral systems in humans.

The scope of this market characterization of light and wellness products does not include germicidal and antibacterial/antimicrobial lighting products, products marketed for light therapy (including products for treating depression or seasonal affective disorders, headaches or any skin treatment therapies, etc.), nor residential-grade, consumer-grade products or [product categories](#) that are not on the DLC's Solid-State Lighting Qualified Products List (QPL).

Project Objectives

The objective of this project is to complete a market assessment and market impact report on relevant light and wellness products for the DLC in Q2/Q3 2021. The DLC has identified the relevant market segments as commercial office, education, and healthcare applications. The budget is \$US 40,000 - 50,000.

¹ This is often referred to as circadian lighting but is also often called human-centric lighting. One manufacturer uses the term humanistic lighting.

Services to Be Performed

Proposals are expected to cover the following services:

Task 1. L&W Market Trends and Barriers – Broad Scope including US and Canada.

Task 1.1. Identify current market trends for the next five years for the following market segments, defined as: commercial office, education, and commercial healthcare. The commercial healthcare segment includes the following subsegments: hospitals and long-term care facilities, including skilled nursing facilities. The educational segment should focus on the K-12 subsegment.

1. Estimate the market trends in lighting design/product development/solutions for L&W for the next five years.
2. Key questions:
 - a. How are the identified segments rank ordered? Are there other major segments beyond these?
 - b. Do the trends vary by segment and/or subsegment?
 - c. How do the trends intersect with energy efficiency and controllability?
 - d. How have the market trends changed based on COVID-19 impacts?

Task 1.2. Identify market barriers for the lighting industry developing L&W products/solutions for the next five years.

1. Identify the market barriers for the next five years.
2. Are the barriers different between market segments?
3. Are there barriers specific to the distribution chain?
4. Identify market actors similar to the DLC who are creating technical specifications or qualified product lists (QPLs) for the L&W market.
 - a. What are their scopes, reach and offers?

Task 2. L&W Market Characterization for the US and Canada.

Task 2.1. Identify product manufacturers (LED luminaires, LED retrofit kits, and controls) that are developing L&W products and estimate unique SKUs for each manufacturer.

1. Identify manufacturers with approximately 80% of the US and Canada market share (luminaires, lighting controls, sensors, and systems). The DLC will provide a preliminary list of manufacturers to the selected consultant as a starting point.
 - a. For each lighting fixture manufacturer, estimate total product quantity, including primary catalog number and total number of available SKUs within, and considering all options for each model (including different spectral and spatial distributions, different light output and form factors, different light engines (1-, 2-, 3-, 3+ channels)). In addition to typical form factors, please include innovative luminaire designs (e.g., artificial skylights and windows). SKUs that only alter the mounting height configuration or voltages should not be included in the total product quantities.

- i. Identify luminaire manufacturers with standalone products.
 - ii. Identify LED retrofit kits.
 - iii. Identify manufacturers who offer a complete system of compatible and interconnected components (luminaires, controls, IoT applications).
 - 1. Include IoT solutions with description by subsegment/facility type (e.g., change SPD to support day/night cycles; offer white-tunable CCTs and dimming).
 - iv. Identify if manufacturer offers any services (commissioning, software upgrades, retro-commissioning, installation, financing, Lighting as a Service (LaaS), Software as a Service (SaaS), etc.).
 - b. For each control only manufacturer, identify total number of uniquely marketed systems, and indicate interactions with sensors and lighting fixtures.
2. For each of 2.1.1.a-b, summarize their solutions, services, and their value propositions by market segment.
3. For the top manufacturers in 2.1a-b (at least three):
 - a. Consultant shall determine how many interviews are needed to deliver a viable data set.
 - b. Through interviews, estimate their total sales (in units), project SF, and market share for the next five years based on 2019/2020 data.
 - c. Ask for their view on technologies, metrics, and market drivers.
 - d. Identify if the DLC QPL has value to them.
 - e. Assess their market position (Leader, Challenger, Follower).

Task 3. Deliverables

The winning project team will share information with the DLC team via bi-weekly meetings, a detailed draft report (not just slides with bullets), and a summation webinar. The DLC team will provide feedback to the winning team about the draft report and the team will then issue a final report.

Add Alternate - Task 4. Value Chain

This is an optional task. Please quote the cost of completing this task separately from tasks 1-3.

Task 4.1. Identify key value chain members.

Value chain groups and members should be organized by decision makers, influencers, and end users. A list of groups of value chain members is provided below, but this may not be enough to describe the decision flow process, or some of these members may not be influencers or key decision makers.

1. Identify the top constituents within each value chain group. Examples of value chains: product sales channel (e.g., manufacturer – distributor – contractor – owner), an educational channel (e.g., researcher – trade publication – specifier), etc.

- a. Do the value chains differ by market segment?
 - b. Map the decision flow in each value chain between members.
2. Rank each member in the identified value chains as: 1) decision makers for lighting purchases, 2) influencer, and 3) end-user.
 - a. Determine what each of their biggest needs and challenges are in the context of light and wellness.
 - b. Identify primary goals and value propositions for L&W lighting/solutions for each value chain member in each group in the decision flow.
 - i. Assess their market position (Leader, Challenger, Follower).
3. Interview at a minimum the top three members of each value chain group to understand metrics used, current and emerging technologies, and awareness of DLC products.

Potential value chain members, excluding manufacturers (specifically addressed in task 2.1):

1. Utility program administrators, implementers, and managers
 - a. Identify those who are incenting L&W products and/or systems
2. Regulators/code bodies
 - a. Identify those who have L&W codes or regulations (beyond IES, WELL)
3. Design/build/engineering firms focusing on design for L&W
4. Researchers funding and publishing L&W peer-review publications (beyond LRC, Harvard, PNNL)
5. Trade publications focusing on L&W
6. Trade organizations (beyond American Medical Association (AMA)) who have issued guidance or opinions on L&W)
7. Facility owners/managers in each subsegment

Interim Deliverables

Consultant will hold biweekly web-based meetings with the DLC team to report progress and gain necessary input, to be scheduled at project kickoff. In preparation for biweekly meetings, consultant will send draft meeting agenda and materials to DLC team members 48 hours ahead of each scheduled meeting.

Final Deliverables

All raw data, notes, and survey materials shall be included with the final report. Written reports are due per the schedule below. In addition, consultant will host a two-hour webinar one week after the draft report is emailed to the DLC, so that DLC staff can hear a report summary and ask questions.

Project Schedule

Based on the milestone schedule given in the latter part of this RFP, the DLC anticipates the following key dates in this project.

Start date	April 30, 2021
Draft report due	July 31, 2021
Final report due	August 21, 2021

Submittal Information

Contact and Communications

All communications between bidders and Efficiency Forward (EF) are to be directed to:

- Stephen White, Chief Operating Officer, swhite@designlights.org.

Bidders' Questions & Responses

Bidders may submit questions on this RFP via email. All questions submitted prior to **March 19, 2021 at 4:00 PM EST** will be posted with answers on the DLC website on or before March 23, 2021.

RFP Submittal Deadline & Format

Bidders are required to submit their proposal by **March 29, 2021 at 4:00 PM EST** via email to Stephen White, Chief Operating Officer, 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:

RFP Issued	March 10, 2021
Questions due no later than	March 19, 2021
DLC responses no later than	March 23, 2021
Proposals due	March 29, 2021
Anticipated notification to successful bidder	April 7, 2021
Anticipated contract start date	April 30, 2021

Minimum Qualifications

A single firm or a group of firms under a single primary contractor with more than five years of experience in a related field may submit bids. Changes in proposed key staff members may not be made during the execution of the work without written approval of EF.

- Key staff members must have demonstrated expertise in market characterizations for lighting products.
- Contractor must not be affiliated with any lighting product manufacturer, designer, or installer *in a fiduciary manner*, whether by ownership or contract.
- Contractor must demonstrate a history of completing projects on time and on budget.

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

The submission of a proposal to EF shall constitute a bidder's acknowledgement and acceptance of the terms, conditions, and requirements outlined in this RFP.

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.

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
Must indicate the RFP name, the proposal date, bidder’s name, and list of subcontractors.
- Signed Cover/Transmittal Letter
Must 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.
- Table of Contents
- Team and Location
Provide a general introduction to the representatives of the consulting team, including each team member’s area of expertise.
- Statement of Work
Provide a high-level overview of the proposed approach to the scope of work.
- References
Supply three (3) references (names and telephone numbers) of clients, supplier diversity certifications if applicable.
- Conflicts of Interest (if needed)
- Appendix – Resumes of Key Staff

Evaluation of Proposals

EF will evaluate proposals on criteria including but not limited to 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.

RFP Evaluation Criteria/Scoring Matrix
<p>Part A: General Approach</p> <ul style="list-style-type: none"> ● Proposal quality – comprehension and clarity regarding meeting project objectives and quality of proposed approach for meeting those objectives ● Thoroughness and practicality of approach ● Creativity of approach
<p>Part B: Qualifications and Experience</p> <ul style="list-style-type: none"> ● Key staff experience, experience with similar projects and research
<p>Part C: Cost</p> <ul style="list-style-type: none"> ● Total project cost proposal and hourly rates
<p>Part D: Supplier/Vendor Diversity</p>