REGIONAL EVALUATION,
MEASUREMENT & VERIFICATION FORUM

Request for Proposals (RFP)

C&I Lighting Load Shape Project

Issued by:

Northeast Energy Efficiency Partnerships, Inc

Issued:
December 11, 2009 (EST)

Questions and Notice of Intent to Bid Due:
December 18, 2009, 4:00 PM (EST)

Proposals Due
January 8, 2010, 4:00 PM (EST)

RFP website

TABLE OF CONTENTS

C&I LIGHTING LOAD SHAPE PROJECT

EXECUTIVE SUMMARY AND PROJECT OBJECTIVES

On behalf of the Regional Evaluation, Measurement and Verification Forum (the Forum), Northeast Energy Efficiency Partnerships, Inc. (NEEP) is issuing this request for proposals. The Forum is a regional project – facilitated and managed by NEEP – representing states in New England, New York and the mid-Atlantic. The Forum is undertaking a number of projects in the 2009-2010 timeframe, including this effort to develop commercial and industrial lighting load shape data for facilities located in New England, New York and the mid-Atlantic.

Forum members require hourly load shape data in order to quantify the benefits of efficient lighting measures installed in commercial and industrial facilities. The benefits include avoided capacity costs resulting from reduced electric demand during peak hours, avoided energy costs resulting from energy savings during seasonal and on/off-peak periods and reduced emissions during High Electric Demand Days. Therefore the objective of the present study is the development of lighting load factor data for every hour of the calendar year. The annual load shape data must also be adaptable to different program participant populations located within the service territories of Forum members. The load shape data will accordingly be disaggregated by facility type in order to provide for the calculation of aggregate load shapes that reflect the facility composition of different Program Administrator (PA) customer populations.

The Forum recently completed an inventory and assessment of completed existing end-use and load shape data studies as Phase 1 of its Load Shape Study Project. Based on the results of the Phase 1 review and analysis and informal feedback from Forum members, the project Subcommittee has determined that the existing data are sufficient in quality and quantity to derive reasonable estimates of C&I lighting load shapes that can be used by Forum members for the applications listed above. Therefore the scope of work described below is limited to the compilation and analysis of existing measured data that will be available at the time of project initiation.

The final product of the Project shall be a report, with supporting documentation and data. The contractor will be required to provide the load shape data in a spreadsheet file that allows the user to specify a weighted aggregation of facility types to produce an annual (8,760 hour) load shape and an option to calculate the average load factor over user-specified time intervals. Other deliverables will include a presentation, reporting on preliminary/draft findings, and participation in various Forum meetings/teleconferences.

NEEP intends to enter into a contract with one or more consultants selected, on behalf of the Forum, as a result of this RFP process. A NEEP project manager, a technical and policy advisor, and a sub-committee of Forum members will provide oversight and guidance during the project.

The work is to be completed by May 17, 2010, with preliminary/draft findings available by April 2010.

BACKGROUND

The Regional Evaluation, Measurement and Verification Forum (the "Forum") includes public and private sector representatives from the New England states, New York, New Jersey, Maryland, the District of Columbia and Delaware.

The objective of the Forum is to support the successful expansion of demand-side resource policies and programs, by:

- Providing for consistent, credible and accessible savings data from demand resources to support state and regional energy, climate change and other environmental policy goals,

- Reducing the cost of evaluation, measurement and verification (EM&V) activities by leveraging resources across the region for studies of common interest, and

- Removing barriers to the participation of demand-side resources in regional markets by establishing regional protocols to be adopted by the states.

Thus, the Forum serves five core functions:

1. Provide a framework for multi-state agreement on consistent EM&V protocols;
2. Develop common/consistent protocols;
3. Coordinate multi-state research and evaluation;
4. Aggregate and provide access to state and regional level demand-side resource data; and
5. Provide access to, and visibility and technical support for Forum products and results.

The Forum is managed by the Northeast Energy Efficiency Partnerships ("NEEP"). NEEP staff serve as facilitators, conveners, project managers and administrators for the Forum and its activities. A regionally representative Forum Steering Committee of stakeholders directs the Forum's agenda and recommendations. Specific Forum projects are undertaken with the input and guidance of topical Project Committees.

The three Project Committees are:

- Protocol Development Committee. Focus is to consider and develop a) common/consistent protocols for EM&V characteristics (e.g., EM&V methods, precision/accuracy guidelines); b) common energy and demand savings assumptions, including stipulated values for common measures, input assumptions (e.g., measure life/persistence), and coincidence factors, and potential supporting on-line database; and c) common reporting formats for savings data and associated cost and emission reductions.

- Research & Evaluation Committee. Focus is to undertake and support coordinated research and evaluation projects that serve as basis for protocol development (e.g., common assumptions). Examples of projects include savings load shape analyses (e.g., to inform coincidence factors); measure life and persistence studies; spillover and free-ridership approaches; common measure cost input assumptions, etc. Projects may include coordination of multi-state projects that involve a subset of the region.

- Education and Information Access Committee. Focus is to guide and help ensure Forum products and results (e.g., studies, reports, protocols, recommendations, references,

etc.) are visible and readily accessible to stakeholders, while ensuring protection of any confidential information.

This project falls within the purview of the Research & Evaluation Committee.

For more information on the Forum, please see http://neep.org/emv-forum.

WORK SCOPE AND DELIVERABLES

While information in this Section is being provided to assist potential bidders, bidders are requested to propose their own approach to meeting the project objectives, including their recommendation for appropriate report contents, schedule and budget as well as possibly modified or additional tasks.

A. Overview

Technical Requirements

The contractor will review, compile and analyze available commercial and industrial lighting end-use load data and develop annual (8,760 hour) load shapes that can be used in various applications by Forum members. The primary applications of the load shape data are:

- Quantification of efficient lighting savings during peak load hours as defined by ISO New England and PJM market rules governing participation in forward capacity wholesale markets.
- Quantification of efficient lighting savings during summer/winter, on-peak/off-peak energy costing periods.
- Quantification of efficient lighting savings during High Electric Demand Days (HEDD) for the purpose of air-quality regulation modeling.

The Forum recently completed an inventory and assessment of completed existing end-use and load shape data studies that may be useful to Forum members. The September 2009 report, *End-Use Load Data Update Project Final Report Phase 1: Cataloguing Available End-Use and Efficiency Measure Load Data* is available on-line at

http://neep.org/uploads/EMV%20Forum/EMV%20Products/KEMA%20End%20Use%20Catalog%20Report%20FINAL%20for%20Web.pdf.

Based on the results of the Phase 1 review and analysis and informal feedback from Forum members, the project Subcommittee has determined that the existing data are sufficient in quality and quantity to derive reasonable estimates of C&I lighting load shapes that can be used by Forum members for the applications listed above. This assessment is based on the assumption that (with some exceptions) C&I lighting load shapes can be extrapolated from measured time intervals (of at least a week in duration) to other periods during the year and that lighting load shape data are transferable among facilities with similar operating schedules located in different geographical areas.

The Forum recognizes that the limitations of the available data will require a certain degree of judgment and selectivity in order to compile a data set that will yield a meaningful set of load

shapes, because of trade-offs between data quality, consistency and (temporal and geographic) scope. The scope of the data compilation and analysis is described as follows.

Target Population

The target population consists of commercial and industrial efficiency program participants who have installed efficient lighting equipment at facilities located within the participating PA service territories. The PA service territories are listed in Table 1.

Table 1

State	Program Administrator	State	Program Administrator
CT	United Illuminating	MA	National Grid
	CL&P		NSTAR
ME	Efficiency Maine		Unitil
NH	National Grid		WMECO
	PSNH		Cape Light Compact
	Unitil		SMECO
	NHEC		Allegheny Power
NY	NYPA	RI	National Grid
	LIPA	DE	DE SEU
	NYSERDA	MD	BGE
	National Grid		PEPCO
	Consolidated Edison Co		SMECO
	Orange and Rockland		Allegheny Power
	Central Hudson		MEA
	NYSEG/RG&E	D.C.	PEPCO
VT	VEIC		

Differences in the distribution of facility types and sizes among the target populations must be considered in the development of the load shape data. Therefore it will be necessary that the contractor account for these factors in the process of data selection and compilation. PAs will provide the contractor with a characterization of their respective populations to inform data compilation and analysis. It is assumed that the available data sets will permit some degree of disaggregation of load shapes by facility type and size so that the disaggregated data can be used to form weighted aggregate estimates for different populations as appropriate. The specification and definition of facility types and sizes will be determined in consultation with the project review team once the contractor has had the opportunity to review the source data (see Task 5 below).

Measure Categories

The major lighting measure categories, per cent annualized savings by measure and annualized kWh savings for a representative implementation year for seven different PAs are presented in Table 2.

Table 2

State	PA	Linear Fluorescent	HID	CFL	Controls	Other	Annual kWh
ME	Eff. Maine	28%	56%	2%	11%	2%	34,365,124
NH	PSNH	85%	5%	5%	5%	0%	20,050,103
MA	NGRID	49%	41%	5%	4%	2%	32,768,957
	NSTAR	57%	2%	2%	18%	21%	46,611,592
CT	CL&P	75%	11%	1%	12%	1%	74,053,293
NY	NYSERDA*						606,000,000
	NYPA*	65%	15%	5%	10%	5%	589,195,192

*Annual savings is based on multiple installation years.

The data in Table 2 are presented to provide an indication of the types of measures that have been installed in the PA programs. The scope of the present study is limited to the following measure categories:

- Indoor Lighting Fixtures
- Outdoor Lighting Fixtures

If the data are sufficient to compare load shapes among major sub-categories of indoor lighting, e.g. linear fluorescent and compact fluorescent fixtures, this may be of interest. Therefore the contractor should allow for the possibility of some additional (but limited) disaggregation by measure type.

The analysis of lighting control load shapes, considered as independent measures, is outside the scope of the present study. If the data are sufficient to compare the load shapes of controlled and uncontrolled fixtures, the contractor will perform an analysis to quantify the difference and make a recommendation regarding the treatment of controlled vs. uncontrolled fixtures in the development of the final load shape data.

Definition of Load Shape Data

The source end-use load data should be restricted to hourly on-site measurements of the operation of the targeted lighting equipment. For each measure category, the Load Shape is the relative amount of electric energy saved in every hour of the calendar year. The hourly savings is quantified relative to a normalizing constant, e.g. connected load reduction. For the purpose of the present study, the hourly load factor, i.e. hourly energy divided by connected load, will be employed as a reasonable approximation to the hypothetical "savings load shape". So, for example, the controlled and uncontrolled lighting load shapes will be applicable to the connected load reduction of the efficient fixtures under the assumption that the baseline equipment was respectively controlled or uncontrolled.

The contractor will be required to calculate aggregated load shapes for a few different facility weightings to be specified once the extent of disaggregation that is supported by the data can be determined. The contractor will also be required to calculate and report estimates of the average load factors during summer and winter peak periods (see below under Statistical Precision and Bias). The final data will be provided in a spreadsheet that will allow the user to specify load shape aggregation and time-averaged load shape estimates (see Task 6 below).

The Forum recognizes that it will not be possible to compile a sufficient sample of measured data for every hour of the year. The proposal should accordingly include a description of the methodology that will be employed to extrapolate measured data, by facility type, in order to produce a complete (8,760 hour) load shape estimate.

Statistical Precision and Bias

The objective of the study is to compile sufficient data to achieve 10% precision at a two-sided confidence level of 90% for each major measure category. The precision criterion applies to estimates of the following load shape parameters when aggregated across facility types for a specific population:

- Average Summer 2-6 pm, non-holiday week days in June, July and August
- Average Summer 1-5 pm, non-holiday week days in June, July and August
- Average Summer hours, non-holiday week days in June, July and August when the ISO New England Real-Time System Hourly Load is equal to or greater than 90% of the most recent "50/50" System Peak Load Forecast for the applicable Summer Season.
- Average Winter hours, non-holiday week days in December and January when the ISO New England Real-Time System Hourly Load is equal to or greater than 90% of the most recent "50/50" System Peak Load Forecast for the applicable Winter Season.
- Average Winter 5 – 7 pm, non-holiday week days in December and January

The methodology to extrapolate the measured data to a representation of annual (8,760 hour) load shape and the methodology to aggregate facility load shapes should be designed to control bias in the resulting estimates.

Source Data

The Phase 1 report referenced above identified a number of studies that produced potentially useful data. One in particular has been singled out as a source for the present study. Measured lighting data were compiled and analyzed by RLW/KEMA for the New England State Program Working Group and completed in 2007. The study utilized existing residential and non residential lighting logger data and created summer and winter lighting load profiles that were used to develop coincidence factors for the ISO-NE FCM on-peak and seasonal peak performance hours. The study is posted to the RFP website at: http://neep.org/emv-forum/about-emv-forum/emv-forum-rfp

In addition to the studies identified in the Phase 1 report, other completed studies and ongoing studies that may be completed prior to project initiation should also be considered for the present compilation. The Subcommittee will provide the contractor with an updated list of available data.

B. Project Tasks

Task 1: Kick Off Meeting

The contractor will hold a kick off meeting or teleconference with NEEP project manager, NEEP's technical and policy advisor, and a sub-committee of Forum members to: Discuss scope, schedule and approach; Review objectives and expectations for sub-committee participation in

study; Review the proposed work plan and schedule; Review contractor data requirements, secondary data sources and information characterizing PA lighting programs; and Establish project management process.

Schedule: within one week of contract signing

Deliverable: minutes of meeting

Task 2: Final Work Plan

The work plan will be finalized and submitted to the Project Coordinator for review and approval by the Project Review Team.

Schedule: within two weeks of contract signing

Deliverable: Final work plan

Task 3: Procurement of Program Administrator Data and Inventory of Potential Secondary Source Data

The contractor will prepare and submit a data request to the Project Coordinator specifying the required information characterizing PA lighting programs and the information required to screen source data for inclusion in the study.

Schedule: data delivered to contractor within three weeks of contract signing

Task 4: Review, Selection and Procurement of Source Data

The contractor will review available reports and supplemental information to determine which data sources will be included in the compilation. The contractor will document the review and selection process and submit the report to the Project Coordinator for review and approval by the Project Review Team. Upon approval the contractor will prepare a detailed data request and the Subcommittee will facilitate the procurement of the source data.

Schedule: within five weeks of contract signing

Deliverable: report of the results of the assessment and selection of data sources

Schedule: within seven weeks of contract signing

Deliverable: source data delivered to contractor

Task 5: Analysis of Source Data

The contractor will utilize the source data to develop lighting load shapes for the major measure categories. The load shapes will be disaggregated by facility type and size (small vs large) to the extent supported by the data. The contractor will prepare an interim report that will be submitted to the Project Coordinator for review and approval by the Project Review Team. The interim report will include:

- documentation of the analysis methodology
- presentation of the results disaggregated by facility type
- recommended aggregation (weighting) for service territories
- assessment of statistical precision.

Schedule: within ten weeks of contract signing

Deliverable: Interim Report

Task 6: Development of Load Shape Tool

The contractor will develop an Excel spreadsheet containing the disaggregated load shape data. The spreadsheet will be set up to allow the user to specify a weighted aggregation of facility types to produce an annual (8,760 hour load shape) and an option to calculate the average load factor over user-specified time intervals. Detailed specifications of the format and functionality of the Load Shape Tool are contained in Appendix A.

Schedule: within twelve weeks of contract signing

Deliverables: Load Shape file in Excel format

Task 7: Draft Report

The Draft Report will include:

- documentation of the analysis methodology
- presentation of the results disaggregated by facility type
- presentation of aggregated load shape data
- presentation of estimated load shape parameters
- assessment of statistical precision
- description of spread-sheet tool
- recommendations for future data collection/analysis.

Schedule: within twelve weeks of contract signing

Deliverables: Draft report (Microsoft Word and Adobe Acrobat formats)

Task 8: Presentation of Findings, Recommendations and Demonstration of LS Tool

The contractor will deliver a presentation of the methodology and findings to the Project Review Team and other EM&V stakeholders.

Schedule: within fourteen weeks of contract signing

Deliverables: Presentation of findings

Task 9: Final Report

Schedule: within sixteen weeks of contract signing

Deliverables: Final report (Microsoft Word and Adobe Acrobat formats)

Task 10: Data Transfer

The contractor will provide load shape data files in electronic format.

Schedule: within sixteen weeks of contract signing

Deliverables: Load shape data

Task 11: Interactive Effects

The contractor will submit a proposal and budget to estimate interactive adjustment factors that are applicable to estimated summer and winter peak coincidence factors in a subset of the source data. The methodology employed to estimate the unadjusted coincidence factors and the interactive adjustment factors will be based on the general approach that is documented in the RLW/KEMA study referenced above. The purpose of this task is to update the findings of the RLW/KEMA study to incorporate additional measured lighting and HVAC data that have been collected in New England since 2007. Additional sources of data that may be incorporated in the interactive analysis include the following:

2007 Business and Construction Solutions (BS/CS) Programs: Measurement and Verification of 2007 Lighting Measures, NSTAR Electric. Prepared by KEMA, July 21, 2009

The primary objective of this evaluation was to develop estimates of gross and net annual and lifetime savings for a sample of lighting projects from the Business Solutions (retrofit) and Construction Solutions (new construction) components of the BS/CS program. Eighty projects were selected for inclusion in the lighting impact evaluation effort. Site evaluation activities were conducted during 2008 and early 2009 in accordance with established M&V protocols. Time of use (TOU) and power monitoring for a period of at least four weeks was conducted to characterize operating, load, and demand profiles. Coincident peak demand assessed using relative precision of +/- 10% at the 80% confidence level for summer and winter KW was the key design criteria for the lighting evaluation sample. The on-sites identified the type of areas the lighting fixtures were installed in and the control strategies being used. Interactive energy impacts associated with a program measure installation were quantified.

Connecticut Small Business Energy Advantage Impact Evaluation Report Program Year 2007. Prepared for Connecticut Energy Conservation Management Board, The Connecticut Light and Power Co. and The United Illuminating Co. Prepared by Cadmus, August 24, 2009

Verification and data collection visits to a statistically selected sample of 121 Small Business program participants from the 2007 program year were conducted. Lighting loggers measured operating hours and other meters measured runtime and energy use for other equipment. Metering took place during a 3 to 10 week period. Energy and winter and summer demand savings were calculated. Precision achieved at the 80% confidence level was reported. Adjustment for the impact on cooling load was added to the program savings database in 2008.

Ongoing study for The Connecticut Light and Power Co. Conducted by KEMA

On-site visits and measurement using instantaneous power readings, time-of-use loggers, electrical current loggers, and multi-channel three-phase power loggers have been used to inform savings calculations with direct measurement of electrical usage and/or hours of operation for a sample of 55 C/I sites from the Energy Opportunities program that provides prescriptive rebates for efficiency measures. Measurements were collected over a three to six week summer period. This study includes thirty lighting sites. Gross energy and demand impacts, coincidence and adjustment factors and HVAC interactive effects will be calculated. Results (in report form) are expected in late 2009.

Two ongoing lighting studies for Western Massachusetts Electric Company.

Impact research on large c/I programs (including metering of lighting in 12 sites) and on the small business program is underway in two separate projects and results may be available for use in this project, however additional information on these projects is not readily available at this time.

Schedule: within sixteen weeks of contract signing

Deliverables: A section of the Final Report will document the methodology and results of the analysis of Interactive Effects.

SUMMARY OF TASKS AND DELIVERABLES

PROJECT TASKS	Schedule	DELIVERABLES
Task 1. Kick-off Meeting	*within one weeks of contract signing*	*Meeting Minutes*
Task 2: Final Work Plan	*within two weeks of contract signing*	*Final Work Plan*
Task 3: Procurement of Program Administrator Data and Inventory of Potential Secondary Source Data	*within three weeks of contract signing*	*PA and Inventory Data*
Task 4: Review, Selection and Procurement of Source Data	*within five weeks of contract signing*	*Data Assessment Report*
Task 5: Analysis of Source Data	*within ten weeks of contract signing*	*Interim Report*
Task 6: Load Shape Tool	*within twelve weeks of contract signing*	*Excel file*

Task 7: Draft Report	*within twelve weeks of contract signing*	*Draft Report*
Task 8: Presentation of Findings	*within fourteen weeks of contract signing*	*Presentation of findings*
Task 9: Final Report	*within sixteen weeks of contract signing*	*Final Report*
Task 10: Data Transfer	*within sixteen weeks of contract signing*	*Load shape data*
Task 11: Interactive Effects	*within sixteen weeks of contract signing*	*Section of Final Report*

GENERAL SUBMITTAL INFORMATION

This Section of the RFP provides information for bidders concerning the submittal process, general requirements, schedule, and qualifications. Specific requirements for the content and preparation of bids are contained in Section 5.

C. Contact and Communications

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

Elizabeth Titus, etitus@neep.org, 781-860-9177 x111

Cecily McChalicher, cmcchalicher@neep.org, 781-860-9177 x138

Any unauthorized contact may result in the disqualification of the contacting firm's proposal(s).

Potential bidders are encouraged but not required to submit a **notification of intent to submit a proposal in response to this RFP by 4 pm EST on December 18, 2009 to the NEEP contacts above.** This information helps NEEP administer the RFP.

D. Bidders' Q&A

Bidders may submit questions via e-mail for this RFP. A website has been established for this Project RFP: http://neep.org/emv-forum/about-emv-forum/emv-forum-rfp

All questions submitted prior to 4 pm on December 18 will be posted and answered on the website by Dec 22. All questions and answers will be available to all respondents.

E. RFP Submittal Format and Due Date

Bidders are required to submit electronic versions of their proposal to:

Elizabeth Titus, etitus@neep.org, 781-860-9177 x111

Cecily McChalicher, cmcchalicher@neep.org, 781-860-9177 x138.

The proposals should be submitted in both Microsoft WORD (97-2003) and Adobe Acrobat format.

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.

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

F. RFP Schedule

RFP release	December 11, 2009
Intent to bid notice	December 18, 2009
Close of RFP question period	December 18, 2009
Electronic proposals due	January 8, 2010
Anticipated date of bidder selection	January 15, 2010
Anticipated contract start date	January 20, 2010

The above schedule is subject to change by NEEP.

G. Minimum Qualifications

A single firm or a team of firms under a single primary contractor may submit bids.

Key staff members must have demonstrated experience delivering high-quality EM&V services and/or studies for system benefit charge funded DSM programs. Changes in proposed key staff members may not be made during the execution of the work without written approval of NEEP.

H. Modifications to the RFP

NEEP may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum to all parties who have submitted a notice of intent to bid by the required date.

I. Post Proposal Negotiation and Awarding of Contracts

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

J. Acceptance of Terms and Conditions

The submission of a proposal to NEEP shall constitute a Bidder's acknowledgement and acceptance of all the terms, conditions and requirements of this RFP.

NEEP will utilize its standard Services Agreement to contract for the services outlined in this RFP. **A list of exceptions to this document should be returned with bidder's response, see Section 5 of this RFP**. The Services Agreement is included as an attachment to this RFP, Appendix C.

K. All Submitted Proposals Become Exclusive Property of NEEP

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

PROPOSAL SUBMITTAL REQUIREMENTS

L. Submission of Proposals

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

NEEP and the Forum are 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 the NEEP project manager, technical and policy advisor, and a Forum sub-committee.

Bidders are also invited to submit optional tasks and budgets if they believe there are additional or tangential tasks that would benefit the objectives of the Project.

All proposals must include the documents identified in Appendix B "Required Proposal Checklist". **Proposals not including the Checklist may be deemed non-responsive**.

M. Proposal Format

Bidders are requested to provide 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 pro-actively 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 adhere to the following set format (the numbers indicated are suggested maximum page limits):

- Proposal cover
- Signed cover/transmittal letter
- Table of Contents (include proposal date and page numbers on each page of proposal)
- Completed proposal checklist

1. Executive summary (2 pages)

2. Work scope and schedule (10 pages)
3. Staffing and subcontracting plan (2 pages)
4. Qualifications and Experience (10 pages)
5. Budget and Billing Rates (2 pages including tables)
6. Exceptions to contract terms (if needed)
7. Appendix - Resumes (2 pages per resume)

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 RFP closing date.

For the checklist please use the form in Appendix A.

I. Section 1: Executive Summary,

Section 1 of the proposal should contain a high level summary of the proposal including the approach to the tasks and the consultant's or bidding team's qualifications to perform the services sought through this RFP.

II. Section 2: Work Scope and Schedule

Section 2 of the proposal should discuss bidder's approach to Tasks defined in Section 3 of the RFP with consideration of the objectives defined in Section 1. Describe bidder's approaches to each of the work scope tasks with sufficient detail to distinguish the strengths and unique features of the bidder's team and approach. In terms of bidder's approach, an example of an item to cover would be how the bidder would suggest selecting measures or groups of measures as priorities for developing specific EM&V savings methods (See Task 4).

Section 2 must include a schedule for performing the work. The schedule should be presented graphically and supplemented with text explanations needed to provide a complete understanding of the proposed timeline.

III. Section 3: Staffing Plan

In Section 3 bidders are requested to provide a staffing plan. Note that assigned staff qualifications are more critical than firm qualifications and that staffing changes for key personnel are subject to approval by NEEP.

- Describe the roles of each of the positions listed in bidder's staffing plan.
- Identify the lead staff member assigned to manage the work, provide a short biography, and explain why he or she is qualified for this position. Describe this person's availability for the project, and the office where he or she will be based.
- Identify the key personnel to be assigned to this project, describe their responsibilities, and provide a paragraph biography for each person. Indicate availability and length of time commitment to project.
- Specify any anticipated subcontractors who will be used, roles, responsibilities, and proposed subcontractor mark-up percentage.

Include resumes for all individuals named in the staffing plan. Resumes and bios should describe relevant responsibilities from other projects that will help NEEP evaluate the qualifications and experience of key personnel. Please limit length of resumes to **two** pages and place in an appendix.

IV. Section 4: Firm Qualifications and Experience

Use this section to address bidding team's qualifications and experience, drawing on lessons learned and best practices experience. Bidders should also provide two to four references from current (preferred) or recent clients for whom they have performed projects that are relevant to the work scope. References should include a brief synopsis of specific services provided, company name and location, contact name, contact title, telephone number and, email address of the reference. In the event the bidder is forming a new organization to bid on this proposal, the bidder should provide the related references for the key staff members proposed for the project.

References should be included (two to four each) for the proposed prime consultant and any major subcontractors.

V. Section 5: Budget and Billing Rates

Using the two tables shown below bidders must provide labor and other direct costs proposed for this project.

Budget Table One – Billing Rates

Person	Title	2009 Hourly Billing Rate all inclusive)

Budget Table Two – Task by Task and Total Budget

Task	Personnel Assigned	Hours per Personnel Assigned	Labor Costs	Directs Cost (to be billed at cost to Consultant)	Per Task or Total Cost
1					
2					

3					
4					
5					
6					
Total					

VI. Section 6: Exceptions to contract terms

Bidders must provide any requested exceptions to the Services Agreement included as Appendix B.

VII. Section 7 (Appendix): Resumes

Include resumes for key staff noting relevant experience and expertise.

SELECTION PROCESS AND EVALUATION CRITERIA

A quick and straightforward selection and contracting process is planned with work scheduled to begin during January 2010. This may or may not include requests for clarifications and interviews of bidders.

NEEP will base their evaluation of proposals on the scoring matrix below. Parts A and B of the scoring criteria will be weighted higher than Part C.

Table 5.1: RFP Evaluation Criteria/Scoring Matrix

Part A: Technical Approach
1. Proposal quality
2. Thoroughness and practicality of approach
3. Clarity regarding meeting project objectives and quality of proposed approach for meeting those objectives
4. Creativity of approach
Part B: Organizational and Management Capability
1. Demonstrated competence and experience of key staff
2. Demonstrated competence and experience of firm(s)
3. References
4. Approach to use and management of subcontractors
5. Regional presence
Part C: Cost
1. Total costs
2. Billing rates and direct costs/subcontractor mark-up rates (if any)
Total

APPENDIX A: LOAD SHAPE WORKBOOK SPECIFICATIONS

Task 6 of the RFP requires the development of an Excel file containing disaggregated load shape data that will be set up to allow the user to specify a weighted aggregation of facility types or sizes to produce an annual (8,760 hour load shape) and an option to calculate load shape parameters over user-specified time intervals. The following specifications describe the required functionality of the workbook.

Format: Excel Workbook

Spreadsheets:

1. Aggregation/LS Parameter Definition
    a. Aggregation – User-specified weight for each disaggregated LS (A default weighting will be provided in lieu of user-specified weights.)
    b. For each user-defined LS Parameter (up to 10):
        i. Select Day Types (any subset of Weekday, Weekend, Holiday)
        ii. Select Months (any subset of January-December)
        iii. Select Hours (any subset of 1-24)
        iv. Specify Connected Load Reduction (kW)
        v. Output Annual kWh savings (sum over 8,760 hours)
        vi. Output Period kWh savings (sum over specified hours)
        vii. Output Period kW savings (average over specified hours)
        viii. Output Period kWh savings as per cent of Annual kWh savings
        ix. Output number of Period hours
        x. Output estimated precision of aggregated LS Parameter estimate

    (**NOTE**: LS Parameters will be calculated for the Aggregated LS and each Disaggregated LS.)
2. Disaggregated Load Shapes in a modified EEI* format (one sheet for each LS)
3. Aggregated Load Shape in modified EEI format (based on user-specified weights) (**NOTE**: A generic calendar year must be specified.)

    *EEI (Edison Electric Institute) format is a standard data format used in Load Research. The modified format organizes the data in 365 rows and 27 columns, sorted chronologically. Each row consists of the following columns: Month, Day, Day Type, LS Hours 1-24.

APPENDIX B: REQUIRED PROPOSAL CHECKLIST

REQUIRED PROPOSAL CHECKLIST

Bidder Information		
Name of Bidder:		
Contact Name:		
Contact Phone:		
Contact Email:		
Subcontractors:		
Evaluation Scope		
Proposal Checklist & Locator	Included	Section/Page
Proposal Cover		
Transmittal Letter – signed original		
1. Executive summary		
2. Work scope and schedule		
Schedule figure		
3. Staffing and subcontracting plan		
4. Qualifications and Experience		
References		
5. Budget		
Budget Tables		
6. Exceptions to contract terms		
7. Resumes		

APPENDIX C: NEEP PROFESSIONAL SERVICES AGREEMENT

AGREEMENT

NORTHEAST ENERGY EFFICIENCY PARTNERSHIPS, INC.

and

[contractor name here]

[contract number]

Please note: THE TERMS AND CONDITIONS ARE BEING UPDATED: REVISED VERSION TO BE POSTED TO THE NEEP EMV FORUM WEBSITE AS SOON AS IT BECOMES AVAILABLE. THE TARGET DATE FOR POSTING THESE IS DECEMBER 22, 2009. WE APOLOGIZE FOR ANY INCONVENIENCE THIS MAY CAUSE.