



## **Request for Proposals: 2018 NEEP Summit Planning**

**Issued by Northeast Energy Efficiency Partnerships, Inc.:  
April 27, 2018**

**Notice of Intent to Bid Due:  
Thursday, May 3, 2018, 3:00 p.m. EDT**

**Questions Due Before:  
Thursday, May 10, 2018, 3:00 p.m. EDT**

**Proposals Due:  
Tuesday, May 15, 2018, 6:00 p.m. EDT**



## NEEP Background

Northeast Energy Efficiency Partnerships (NEEP) was founded in 1996 as a non-profit to accelerate energy efficiency as a least-cost resource in the Northeast and Mid-Atlantic region to meet public policy goals for clean, affordable, reliable, and environmentally sustainable energy supplies. Today, NEEP is one of six Regional Energy Efficiency Organizations (REEOs) supported in part by the U.S. Department of Energy to provide technical assistance to states and municipalities to adopt, develop, and implement efficiency policies and programs. NEEP is also funded by foundation grants, state energy efficiency partnership agreements, the NEEP Allies program, and event revenues.

NEEP's **mission** is to accelerate energy efficiency as an essential part of demand-side solutions that enable a sustainable regional energy system. Our **vision** is that the region embraces next generation energy efficiency as a core strategy to meet energy needs in a carbon-constrained world. And our long-term shared **goal** is to assist the Northeast and Mid-Atlantic region in reducing carbon emissions 80% by 2050, relative to 2001.

## Project Objectives

The 2018 NEEP Summit will take place at the newly constructed, upscale, and energy efficient Cambria Hotel & Suites in Middletown, Rhode Island. Just a stone's throw from the classic coastal town of Newport, this new resort will be home to NEEP's two-day Summit on October 2-3 featuring an exciting agenda highlighting leaders and leading examples of advanced energy efficiency solutions and approaches.

The Summit will feature collaborative dialogues and discussions, inspiring keynotes, deep-dive breakout sessions, and other opportunities to connect and partner with regional leaders to accelerate advanced energy efficiency solutions. Topics to be explored include: strategic electrification, advanced integrated efficiency solutions, advanced EM&V and efficient resilient communities.

NEEP is seeking support for different activities related to the planning of this event, including the management of an anticipated 20-30 exhibitors (e.g., obtaining signed agreements and payment, Certificates of Insurance), registrations (250 to 300 attendees), presenter facilitation during the event, and coordination with other contractors (hotel, A/V, etc.). Note that all marketing, publicity, social media, printing of handouts, and session track content and coordination will be carried out by NEEP staff and thus are not covered as part of this RFP.

Please indicate which services can be provided for a budget of \$10-15,000, and what additional services could be performed for a maximum budget of \$20,000. Provide details on the staff, hours, and expenses that comprise your proposed budget. Also provide bios on the staff and the firm's history, experience, and expertise. Please also indicate your payment terms and proposed scheduling to provide superior service for this important regional event.



## Services to Be Performed

Your proposal (based on the above two suggested budgets) is expected to cover the following services:

### Sponsor/Exhibitor Management

- Contractor shall work with NEEP to provide sponsorship fulfillment as directed
- Serve as contact for exhibitor questions regarding booth assignment, shipping, materials, and logistic support questions, obtain signed agreements (NEEP has standard exhibitor agreement) and payment arrangements, obtain and review Certificates of Insurance (NEEP has standard requirements)
- Make recommendations to meet and exceed sponsorship revenue goals
- Report sponsorship leads to NEEP, as appropriate
- Serve as on-site point of contact for exhibitors during the event

### Offsite Registration Management

- Using NEEP's registration software (EventBrite), set up attendee registration portal
- Monitor registration and send weekly reports to NEEP event staff
- Serve as registration point of contact for all attendees
- Make recommendations to NEEP regarding suggested marketing to drive and exceed registration goals based on intended attendees and monitoring of registration

### Onsite Registration and Speaker Engagement

- Develop name badge design and template, and print name badges on site
- Provide onsite support for registration and check-in process
- Staff should be familiar with the onsite payment process and be aware of any issues or changes that have come up
- Assist speakers and presenters to identify the location and time of their sessions to ensure that the event program runs smoothly

### Management of Hotel Relationship

- Prior to event, support NEEP Event Manager on A/V and food & beverage needs
- Assist with room set-up
- Post-event, finalize facility, hotel, and vendor bills for payment

### Relationship with NEEP Event Manager

- Attend regular conference calls with NEEP Event Manager and/or internal planning committee to coordinate efforts and provide updates on Summit planning



## Submittal Information

### Contact and Communications

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

**Lucie Carriou**, Industry Relations and Events Manager: [lcarriou@neep.org](mailto:lcarriou@neep.org), 781-860-9177, ext. 120

### Milestone Schedule

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

<b>RFP Issued</b>	4/27/2018
<b>Notice of Intent to Bid</b> <sup>1</sup>	5/3/2018, 3:00 p.m. EDT
<b>Questions &amp; Responses</b> <sup>2</sup>	5/10/2018, 3:00 p.m. EDT
<b>Proposals Due</b>	5/15/2018, 6:00 p.m. EDT
<b>Anticipated Notification to Successful Bidder</b>	5/18/2018
<b>Anticipated Contract Start Date</b>	5/23/2018

### Modifications to the RFP

NEEP 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.

### 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.

NEEP seeks proposals that demonstrate creativity, expertise, and experience in how the bidder approaches 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 NEEP and finalize a Scope of Services.

Bidders are requested to provide a concise yet complete description of their proposed 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.

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<sup>1</sup> Potential bidders must submit a notice of intent to bid (i.e., submit a proposal) in response to this RFP by the deadline noted in the Milestone Schedule. This notice should be in the form of a short e-mail to the designated NEEP contact. In the case that the bidder did not receive the RFP until after the deadline, please contact NEEP immediately.

<sup>2</sup> Bidders may submit questions related to this RFP via e-mail to the designated NEEP contact. All questions submitted prior to the deadline noted in the Milestone Schedule will be answered to the best of NEEP's ability.



**Proposals must include the following:**

- Proposal Cover
- Signed Transmittal Letter
- Executive Summary
- Work Scope of Services and Schedule
- Staffing Plan
- Qualifications and Experience
- Budget and Billing Rates
- Appendix – Resumes of Key Staff
- Appendix – Exceptions to NEEP Standard Consulting Agreement (Appendix A), *if any*
- Appendix – Conflicts of Interest, *if any*

The proposal cover must indicate the RFP name, the proposal date, bidder's name, and list of subcontractors. The 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.

Proposals should be submitted in both Word and PDF format. Bidders are *not* required to submit print copies of their proposals.

A confirmation of receipt will be sent via e-mail to those who submit proposals on time. NEEP also 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 final interviews.

**Minimum Qualifications**

A single firm or a team of firms under a single primary contractor may submit bids. Changes in proposed key staff members may not be made during the execution of the work without written approval by NEEP.

**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 at any time without liability or obligation to any respondent.

**Acceptance of Terms and Conditions**

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



NEEP will utilize its standard Consulting Agreement (Appendix A) as the basis for an agreement between NEEP and the selected bidder for the services outlined in this RFP. A list of exceptions to the terms and conditions outlined in the Consulting Agreement should be returned with the bidder’s response.

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.

### Evaluation of Proposals

NEEP will base its 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>
<b>Part A: General Approach</b>
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
<b>Part B: Management Approach</b>
Dedicated resources
Demonstrated management competence of key staff
Approach to use and management of subcontractors (if applicable)
<b>Part C: Qualifications and Experience</b>
Demonstrated competence and experience of key staff and firm(s)
References
<b>Part D: Cost</b>
Total costs relative services provided



**Appendix A:  
NEEP Standard Consulting Agreement**

**Northeast Energy Efficiency Partnerships, Inc.  
Consulting Agreement with  
COMPANY NAME**

This Agreement is made and entered into as of **DATE** by and between Northeast Energy Efficiency Partnerships, Inc. at 81 Hartwell Avenue, Suite 220, Lexington, MA 02421, USA (hereinafter referred to as “NEEP”), a Massachusetts non-profit corporation, and COMPANY NAME, a consulting company, at **ADDRESS, CITY, STATE ZIP** (hereinafter referred to as “Contractor”).

WHEREAS, NEEP is a 501(c)(3) tax-exempt non-profit corporation organized for the purposes of accelerating energy efficiency as an essential part of demand-side solutions that enable a sustainable regional energy system in the Northeast and Mid-Atlantic states, and

WHEREAS, Contractor is engaged in the business of providing professional consulting services.

NOW, THEREFORE, in consideration of the promises, the mutual covenants and agreements herein contained, and other valuable consideration, the receipt, adequacy and sufficiency of which are hereby acknowledged, the parties do hereby agree as follows:

**1. Scope of Services and Work / Special Terms & Conditions**

Contractor shall, at the direction of NEEP, perform the services outlined in Attachment A, Scope of Services and Budget.

Contractor’s work shall be carried out by NAME, and shall be overseen by NAME of NEEP. Contractor agrees that it may not substitute any individual for NAME to carry out its work under this Agreement without the prior written consent of NEEP.

Contractor agrees to meet or exceed the customary standards of care and professionalism expected in Contractor’s industry or area of expertise in performing all services under this Agreement.

**2. Independent Consultant**

Contractor shall at all times be deemed to be an independent consultant. Nothing contained in this Agreement shall be construed as creating the relationship of employer and employee between NEEP and Contractor. Contractor acknowledges and agrees that neither it nor its employees are employees of NEEP and that Contractor is solely responsible for all federal and/or state tax and Social Security liability that may result from performance of and compensation for services under this Agreement. Contractor represents and warrants that all of its employees are eligible to work in the United States and that it has confirmed such eligibility using E-Verify, the Internet-based system that compares information from an employee's Form I-9, Employment Eligibility Verification, to data from U.S. Department of Homeland Security and Social Security Administration records to confirm employment eligibility. NEEP acknowledges and agrees that Contractor is free to provide services to



other clients as long as such provision of services does not interfere with its obligations under this Agreement.

**3. Term**

The period of performance shall begin on the date of this Agreement as set forth above and continue as outlined in Attachment A.

**4. Compensation and Payment**

**IF TIME & MATERIAL CONTRACT:**

Services performed by Contractor will be billed on a time and expenses basis as set forth in the estimated budget in Attachment A. Total billings shall not exceed **DOLLAR AMOUNT** without prior written approval of NEEP. Payment shall follow the process guidelines set forth in Attachment B, Payment and Invoicing Guidelines. Contractor shall submit invoices indicating hours spent, tasks performed, and expenses incurred in connection with tasks set forth in Attachment A.

**IF FIXED PRICE CONTRACT**

Services performed by Contractor will be billed for completion of deliverables, as outlined in Attachment A and consistent with the process outlined in Attachment B, Payment and Invoicing Guidelines. Total billings shall not exceed the budget, as outlined in Attachment A, without prior written approval of NEEP.

**5. Indemnification**

Contractor shall indemnify and hold NEEP harmless against all loss, cost, expense, injury and damage resulting in any way from any negligent act or omission on the part of Contractor or any of its subcontractors or resulting directly or indirectly from Contractor's performance under this Agreement, except to the extent that any such loss or expense is due solely to the negligence of NEEP.

**6. Insurance Requirements**

Contractor shall provide a current Certificate of Insurance ("COI") to NEEP when signing this contract evidencing that it maintains insurance sufficient to cover all work to be performed under this Agreement and the indemnity obligation herein. All such insurance shall be maintained in force throughout the term of this Agreement. Contractor shall ensure that NEEP is added as an additional insured as provided in Attachment C. All insurance coverage shall be provided by insurance companies acceptable to NEEP and having ratings of A- or better as rated by Best's Key Rating Insurance Guide. Minimum insurance coverage is outlined in Attachment C: Insurance Requirements.

**7. Termination**

a) This Agreement shall terminate upon completion of all services that Contractor has agreed to perform pursuant to Paragraph 1 above. NEEP, by written notice, may terminate this Contract for any reason, with or without cause, in whole or in part, at any time. In the event of termination of the Agreement without cause, NEEP will make a pro-rata payment to Contractor based upon the percent of work completed as of the termination date, which payment shall in no event exceed the estimated budget as set forth in Attachment A, and shall have no further liability to Contractor. In the event NEEP has pre-paid for any services or work not satisfactorily



completed as of the termination date, Contractor shall return a pro-rata portion of the payment that corresponds to the unfinished work.

- b) NEEP shall have the right to terminate this Agreement for cause in the event the Contractor is responsible for repeated, persistent or substantial violations of the Agreement, fails to perform, or becomes unable to perform its obligations under this Agreement or fails to provide adequate assurances if requested in writing that it will perform its obligations under the Agreement. In the event NEEP terminates for cause, no further payment will be due.
- c) The Contractor may terminate this Agreement upon 30 days' written notice to NEEP. In the event NEEP has pre-paid for any services or work not satisfactorily completed as of the termination date, Contractor shall return a pro-rata portion of the payment that corresponds to the unfinished work.

## **8. Assignment**

Neither party may assign its obligations or rights under this Agreement without the written consent of the other party.

## **9. Subcontracts**

Contractor shall provide written notice to NEEP of its intention to use a Subcontractor prior to commencement of the Subcontractor's services. NEEP shall have the right of refusal regarding the use of a Subcontractor and approval shall not be unreasonably withheld. Contractor shall remain fully responsible to NEEP for performance under this Agreement, and shall be responsible for the timely delivery of services and quality of work of Subcontractor. Contractor shall not charge NEEP a rate higher than that in Attachment A for specific tasks.

The Contractor shall assume toward the Subcontractor all obligations and responsibilities that NEEP, under this agreement, assumes toward the Contractor, and the Subcontractor shall assume toward the Contractor all obligations and responsibilities which the Contractor, under this agreement, assumes toward NEEP. The Contractor shall have the benefit of all rights, remedies and redress against the Subcontractor that NEEP, under this agreement, has against the Contractor, and the Subcontractor shall have the benefit of all rights, remedies and redress against the Contractor that the Contractor, under this agreement, has against NEEP, insofar as applicable to the Subcontractor.

## **10. Intellectual Proprietary Rights**

All works, materials, information, protocols, processes, data, results, work product, and other items conceived, created, developed, or produced by Contractor or any of its Subcontractors under this Agreement (the "Works and Materials") shall constitute "works made for hire" as that term is defined in Section 101 of the Copyright Act (17 U.S.C. §101) or have similar status under relevant intellectual property law. All right, title, and interest in and to all Works and Materials, including licenses, copyrights, trademarks, patents, and all other intellectual property rights, as between NEEP and Contractor/Subcontractors, shall be owned exclusively by NEEP, and neither Contractor nor any Subcontractor shall have any right, title, or interest in or to such Works and Materials. Contractor agrees to execute any documents of assignment requested by NEEP. To the extent that title to any such Works and Materials may not, by operation of law, vest in NEEP or such Works and Materials may not be considered works made for hire, all rights, title and interest herein, including all intellectual property rights therein or thereto, are hereby irrevocably assigned to NEEP.



The paragraph immediately above shall not apply to Contractor Property. The term “Contractor Property” shall mean all pre-existing material, including, but not limited to, any products, software, materials and methodologies proprietary to Contractor or provided by Contractor or its suppliers and any trade secrets, know-how, methodologies and processes related to Contractor’s products or services, all of which shall remain the sole and exclusive property of Contractor or its suppliers. Contractor hereby grants to NEEP a non-exclusive, non-transferable, irrevocable license to use the Contractor Property contained in the Works and Materials and deliverables provided hereunder for NEEP’s nonprofit purposes only.

**11. Non-Disclosure**

The parties acknowledge that under this Agreement Contractor will likely receive or be shown in hard copy or electronic form “Confidential Information” of NEEP. Contractor agrees that it will not use, share or disclose any “Confidential Information” of NEEP without prior written consent, except for the purpose of performance under this Agreement. Access to the Confidential Information will be limited to those of Contractor’s employees who must have access to enable such performance. “Confidential Information” for these purposes includes, but is not limited to, all information marked confidential by NEEP, as well as all intellectual property and proprietary information of NEEP, and information relating to NEEP’s personnel, board, strategies, tactics, finances, plans and operations. Contractor shall return or destroy all copies of Confidential Information upon termination or expiration of this Agreement.

**12. Representations**

Contractor represents and warrants that it has the legal right and authority to enter into this Agreement and that its performance hereunder will not conflict with or violate any commitment, agreement, or understanding it has to or with any other person or entity.

**13. Access to Books and Records**

NEEP, and any of its duly authorized representatives, shall have access to any books, documents, papers, and records of Contractor which are directly pertinent to this contract for the purposes of making audits, examinations, excerpts and transcriptions. Such access shall be provided as requested, at reasonable times, during the Term of this Agreement and for two (2) years thereafter.

**14. Governing Law**

Any actions arising out of this Agreement shall be governed by the laws of the Commonwealth of Massachusetts, and shall be brought in a state or federal court within the Commonwealth, which shall have exclusive jurisdiction thereof.

**15. Notices**

Any notice required to be given or otherwise given pursuant to this Agreement shall be in writing and shall be hand delivered, mailed by certified mail, return receipt requested, or sent by recognized overnight courier service as follows

If to Contractor: **NAME**  
**TITLE**  
**COMPANY NAME**  
**ADDRESS**



CITY, STATE ZIP

If to NEEP: Robert M. McTighe
Director of Finance & Administration
Northeast Energy Efficiency Partnerships, Inc.
81 Hartwell Avenue, Suite 220
Lexington, MA 02421

16. Severability

If any term of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then this Agreement, including all of the remaining terms, will remain in full force and effect as if such invalid or unenforceable term had never been included.

17. Amendment

No amendment, modification, extension, or rescission of any term or provision of this Agreement shall be effective unless agreed upon in writing by both parties.

18. Waiver

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

19. Entire Agreement

This Agreement and all attachments hereto contain the entire agreement of the parties with respect to the matters covered herein and cannot be modified, except in writing signed by both parties.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement by their duly authorized representatives on the day and year set forth below.

Northeast Energy Efficiency Partnerships, Inc.

COMPANY NAME

By: \_\_\_\_\_

By: \_\_\_\_\_

Name: Robert M. McTighe
Title: Dir. of Finance & Administration

Name: NAME
Title: TITLE

Date: \_\_\_\_\_

Date: \_\_\_\_\_

EIN: 81-3283869

EIN / TIN: EIN OR TIN NUMBER



**ATTACHMENT B**  
**Payment and Invoicing Guidelines**

1. Invoices will be issued monthly or after completion of the specified deliverable for services and expenses up to the approved budget.
  - A. Invoices are due by the 20th of each month for services and expenses in the previous month or after completion of the specified deliverable.
  - B. Invoices must be consistent with the approved Scope of Work and not exceed the contract budget.
  - C. Invoices must be itemized by line item as shown in Scope of Work.
  
2. Invoices should be billed to the following address and via email to [billing@neep.org](mailto:billing@neep.org):

Northeast Energy Efficiency Partnerships, Inc.  
Attn: Accounts Payable  
81 Hartwell Avenue, Suite 220  
Lexington, MA 02421
  
3. Invoice documentation should include:
  - A. Contractor's Taxpayer Identification Number
  - B. For Contractor labor/services:
    1. Total hours worked during the billing period.
    2. Approved billing rate.
    3. Total amount billed for the month.
    4. Overhead charges for billable hours (as approved in budget).
    5. Summary of activities during billing period.
  - C. For expenses:
    1. A list of expenses.
    2. Receipts for all expenses.
    3. Explanation of breakout for shared expenses as applicable (i.e., for travel costs shared with another project).
  
4. Invoices must include an itemized budget summary that indicates:
  - A. Total Approved Budget
  - B. Total of Previous Invoices
  - C. Total Current Invoice
  - D. Remaining Budget
  
5. Invoice should clearly indicate the name and address of the authorized person to whom payment must be sent.
  
6. All invoice payments will be made payable to Contractor within 30 days of receipt of invoice.



**ATTACHMENT C  
Insurance Requirements**

Provide Certificate of Insurance to NEEP with signed Agreement and provide 30-day Notice of Cancellation for all insurance coverage.

<b>Coverage</b>	<b>Minimum Limits</b>
<b>Commercial General Liability</b> Bodily Injury & Property Damage Premises Liability Products/Completed Operations Personal & Advertising Injury Contractual Liability	\$1,000,000 per occurrence (Combined BI PD) \$1,000,000 Personal & Advertising Injury \$2,000,000 Aggregate \$2,000,000 Products/Completed Operations Aggregate
<b>Professional E &amp; O Liability</b>	\$1,000,000 Policy Limit
<b>Automobile</b> For Owned, leased, hired, and non-owned automobiles	\$1,000,000 Combined Single Limit per accident
<b>Umbrella</b>	\$3,000,000 each occurrence and aggregate Products/Completed Operations included
<b>Workers' Compensation</b>	Statutory coverage
<b>Disability Coverage</b>	If located in New Jersey or New York, provide confirmation of State Disability Coverage
<b>Employers Liability</b>	\$1,000,000 each accident \$1,000,000 disease – each employee \$1,000,000 disease – policy limit
<b>Additional Insured Wording</b>	Contractor shall include Northeast Energy Efficiency Partnerships, Inc. and their respective subsidiaries, affiliates, directors, officers, and employees as additional insured under Commercial General Liability, Professional E & O Liability, Commercial Automobile Liability, and Commercial Umbrella Liability policies.
<b>Waiver of Subrogation</b>	Contractor shall include Waiver of Subrogation in favor of Northeast Energy Efficiency Partnerships, Inc. and their respective subsidiaries, affiliates, directors, officers, and employees as additional insured under Workers' Compensation, Commercial General Liability, Commercial Automobile Liability, and Commercial Umbrella Liability policies where allowed by law.
<b>Primary &amp; Non-Contributory</b>	Contractor's Commercial General Liability, Commercial Automobile Liability, and Commercial Umbrella Liability policies shall be primary and noncontributory with any other insurance carried by Northeast Energy Efficiency Partnerships, Inc.

Certificate Holder to read: **Northeast Energy Efficiency Partnerships, Inc.  
81 Hartwell Avenue, Lexington, MA 02421**