



## Request for Consultant Proposals

# Process Mapping for Lighting Project Lifecycle

**Issued by Efficiency Forward, Inc.:**

June 22, 2023

**Questions Due Before:**

July 7, 2023

**Proposals Due:**

July 21, 2023



## **Efficiency Forward/DesignLights Consortium® Background:**

Efficiency Forward (EF)/the DesignLights Consortium (DLC) is a non-profit organization dedicated to accelerating the widespread adoption of high-performing commercial lighting solutions. 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.

## **Project Objectives:**

The DLC is a non-profit organization that creates technical requirements for lighting and controls technologies with the goal of assisting our members – utilities and energy efficiency programs – to confidently design and implement incentive programs. While it's true that LED lighting represents a significant increase in energy savings over legacy technologies, including controls in LED lighting projects allows those projects to increase their potential for energy savings, prolong the lifetime of the overall system, and help enable resiliency and responsiveness to the electric grid.

However, lighting projects that involve networked lighting controls are underrepresented in the market. With efficacy improvements plateauing and networked lighting controls struggling to gain widespread adoption, it is imperative for the DLC to identify barriers in the project lifecycle that cause lighting projects to be implemented without including networked lighting controls. While cost will always be a factor in adoption, more information is needed about the specific process followed by decision makers and factors that make or break a lighting project that includes networked lighting controls. Obtaining this knowledge will inform the development of tools and policies that can better facilitate adoption of networked lighting controls and help DLC members reach their goals of reducing energy consumption and managing peak demand.

## **Services to Be Performed:**

A successful lighting project represents the result of complex interactions that go far beyond our efficiency program members' reach. Information is exchanged between a variety of players that may include (but is not limited to) manufacturers, distributors, project managers, electricians, financial institutions, standards organizations, public utility commissions, government officials, and end users. While keeping the role of the members in the spotlight, the DLC seeks a research team to map the journey of real-life projects through this process – from conceptual phase through installation, commissioning, and ongoing operation.

The projects selected for study may be projects that the research team is already involved with. Due to the time constraints and the fact that lighting retrofit projects likely have lifecycles that exceed the allotted timeframe, it is acceptable to study active projects at the end of their lifecycles and obtain data on elapsed segments of the projects retroactively.

The research should focus on three to five active projects, all of which must be building lighting retrofit projects and not new construction or major renovation. Projects in residential environments and



projects that include only outdoor lighting are excluded. To obtain information on the full suite of project lifecycles, at least one project type from each of the following categories must be included:

- Commercial (retail, office, medical)
- Industrial (manufacturing or warehousing)
- Municipal (schools, public safety, government offices)

As these projects must be located in the service territory of our members, the Respondent can either bring an appropriate project to the table or work with the DLC to develop initial points of contact through DLC members who can then connect the Respondent to representatives from the implementation side of the projects. The size of the projects may be a factor in completing the research within the allotted timeframe, so the specific size of the installation sites is not prescribed here, though studying a range of square footage is preferable.

## **Deliverables:**

### **Deliverable 1: Work Plan**

The work plan should:

- Outline the methodology to be applied
- Communicate roles and contact information for stakeholder
- Describe the structure of the research with checkpoints for progress reporting
- Provide the format of the final report
- Include project milestones and associated deliverables
- Outline the cadence and format of interim status updates.

The DLC will review this work plan and communicate requested changes or clarifications before providing a go-forward decision on subsequent work.

### **Deliverable 2: Individual Process Maps**

Identify the stakeholders associated with each project, then develop personas that characterize their role in the project, the decisions they have influence over, as well as their motivations, goals, and frustrations. For each stakeholder, also create a process map that isolates their interaction with the project as they pursued their goals. These individual process maps should identify:

- Project stages
- Decision points
- Decisionmakers
- Associated documents
- Time intervals

### **Deliverable 3: Composite Process Map**

Whereas the individual process maps will follow individual stakeholders' journeys through the project, a visualization of each project as a whole must be developed to understand the interactions between stakeholders. This composite process map will synthesize the individual process maps into one view and



display the flow of information throughout the project lifecycle. The composite process map should identify:

- Project stages
- Decision points
- Decisionmakers
- Associated documents
- Time intervals

#### **Deliverable 4: Final Report**

Compose a report that synthesizes all aspects of the process mapping project. This report should be composed in mainly narrative format but may also rely on graphics to communicate concepts. It should complement the composite and individual process maps by communicating the subjective experience of the stakeholders, the factors that led to each decision, the roadblocks, and the implemented solutions. The report should aim to identify where improvements to the implementation process would result in higher adoption rates of lighting projects that include lighting systems.

### **Submittal Information:**

#### **Contact and Communications:**

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

Andrew Antares  
Project Manager of Technical Development  
[aantares@designlights.org](mailto:aantares@designlights.org)

#### **Bidders' Questions and Responses:**

Bidders may submit questions on this RFP via email. All questions submitted prior to **July 7, 2023**, will be answered to the best of our ability.

#### **RFP Submittal Deadline and Format:**

Bidders are required to submit their proposal by **July 21, 2023**, via email, to Andrew Antares, Project Manager of Technical Development, at [aantares@designlights.org](mailto:aantares@designlights.org).

- The proposals should be submitted in both Microsoft Word and PDF format.
- 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>	June 22, 2023
<b>Questions Due</b>	July 7, 2023
<b>Proposals Due</b>	July 21, 2023
<b>Anticipated Notification to Successful Bidder</b>	July 28, 2023
<b>Anticipated Contract Start Date</b>	August 4, 2023

### **Minimum Qualifications:**

A single firm or a team of firms under a single primary contractor may submit bids. Key staff members must meet the following qualifications:

- Prior history working in the construction industry is required.
- Experience in the energy efficiency industry is preferred. Firms without this experience are encouraged to submit proposals that include strategies for overcoming the learning curve within the allocated time.
- Firms that specialize in journey mapping and/or qualitative, sociological, or anthropological research will be given special consideration.

Changes to the 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.

### **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.

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.

**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.

**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.

**RFP Evaluation Criteria/Scoring Matrix:**

<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: 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>
<p><b>Part E: Supplier Diversity</b></p> <ul style="list-style-type: none"><li>• Demonstrated certification with MBE, WBE, VBE, DBE program</li></ul>