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## REQUEST FOR QUALIFICATIONS

**December 28, 2016**

### **Notice**

The Regional Technical Forum (RTF), an advisory committee to the Northwest Power and Conservation Council (Council), is soliciting consultant Statement of Qualifications (SOQ) and letters of interest.

### **Purpose**

The goal of this Request for Qualifications (Request) is to generate a pool of qualified professional consultants who may be interested in performing discrete projects in furtherance of the RTF's annual Work Plan. See the RTF's annual Work Plan online at: <https://rtf.nwcouncil.org/about-rtf/work-plan-and-budget>.

### **Selection**

These projects, or "task orders," will be assigned to the consultant judged by the RTF in its sole discretion to be most qualified for the particular work product desired. The projects will have relatively small budgets, certainly under \$25,000. For projects greater than \$25,000 it is the RTF's policy and practice to issue Requests for Proposals. The RTF will negotiate a contract with the consultant selected from the pool of qualified consultants that will typically be memorialized in a standard letter agreement, although additional terms and conditions may be negotiated. The RTF may ask consultants to update their SOQs periodically, but no more than annually.

The RTF reserves the right to reject any and all submittals and to waive irregularities and informalities in the submittal and evaluation process. This Request does not obligate the RTF to pay any costs incurred by respondents in the preparation and submission of their SOQs. Neither does this Request obligate the RTF to accept or contract for any expressed or implied services. Questions regarding the Request or selection process should be directed to Ms. Jennifer Light (email: [jlight@nwcouncil.org](mailto:jlight@nwcouncil.org)). The RTF will not be responsible for any oral instructions. Any changes to the Request will be in the form of an addendum, which will be furnished to all consultants that have submitted a SOQ.

It is the RTF's policy that no person shall, on the grounds of race, color, national origin or sex, as provided by Title VI of the Civil Rights Act of 1964, be excluded from participation in, be denied the benefits of, or be otherwise discriminated against under any of its programs and activities. The RTF is committed to a program of equal employment opportunity regardless of race, color, creed, sex, age, nationality, disability, or sexual orientation.

### **Statement of Qualifications Selection Criteria**

The successful consultant will be selected through a qualification-based selection process. The SOQ must address the following criteria. Applicants are encouraged to organize their submissions according to the general evaluation criteria listed below. Information obtained from the SOQ and from any other relevant source may be used in the evaluation and selection process.

#### *Selection Criteria:*

- Five (5) or more years of related experience
- Experience working with regional utilities, system benefits charge administrative agencies, Bonneville Power Administration, state energy offices and/or state utility regulatory agencies and/or private sector clients
- Demonstrated experience in at least one of the following work areas of the RTF:
  - Measure assessment development, including engineering or statistical analysis for determination of energy savings, development of incremental cost data and cost-benefit analysis
  - Research design and methodology, including statistical and sampling design
  - Guidelines review and development
  - Tool development
  - Market research and analysis

### **Submittal Requirements**

Responses to this Request must include the following information:

- A cover letter/statement of interest indicating the firm's interest in the sorts of projects anticipated in the RTF's annual Work Plan, highlighting its qualifications to perform this sort of work, and a summary of the firm's experience in requested service areas.
- Qualifications for specific RTF work areas (as defined in Selection Criteria above) for which the firm is seeking to support should include:
  - Summary of qualifications
  - Examples of up to (3) similar projects
  - A minimum of (2) references for related projects
- Resumes of key team members
- General rate schedule
- Completion of the Qualifications Summary Form (found in Attachment A)

Responses must be limited to no more than ten (10) pages excluding specific project examples, references, resumes and covers. This is an open solicitation and responses can be submitted at any time. You may update the materials submitted at any time. Materials should be sent to:

Ms. Jennifer Light  
Northwest Power and Conservation Council  
851 S.W. 6th Avenue, Suite 1100  
Portland, OR 97204  
[jlight@nwcouncil.org](mailto:jlight@nwcouncil.org)  
(503) 222-5161

### **Proprietary Material**

The consultant shall clearly identify any proprietary information included in its submittal as such. The RTF will hold in confidence any propriety information submitted and destroy it or return it to the consultant upon request.

### **Evaluation Criteria**

Evaluations will be based on the criteria listed below.

- Experience of firm with similar projects;
- Experience of proposed project team and key team members;
- Overall quality of statement of qualifications; and
- Overall cost-competiveness.

### **Contract Award**

The RTF reserves the right to make an award without further discussion of the submittals. Following consultant selection, the consultant and RTF staff shall negotiate a scope of work and contract. If the selected firm fails to sign the contract within ten (10) business days of delivery of the final contract, the RTF may elect to negotiate a contract with the next-highest ranked firm. The RTF shall not be bound, or in any way obligated, until both parties have executed a contract. No party may incur any chargeable costs prior to the execution of the final contract.

### **Compliance with Laws and Regulations**

The consultant shall comply with federal, state and local laws, statutes and ordinances relative to the execution of the work.

### Qualification Summary Form

*This form is intended to provide a summary of qualifications as described in the proposal. Please complete the form and submit it along with the proposal. Proposals that do not include this Qualifications Summary form will be considered incomplete.*

#### **Demonstrated Experience**

*Please indicate which of the following work areas your firm has demonstrated expertise.*

Measure Development and Analysis

*Please specify skillsets (check all that apply):*

- Engineering analysis for determination of energy savings
- Statistical analysis for determination of energy savings
- Development of cost and benefit and lifetime data
- RTF workbook development

Research Design

*Please specify skillsets (check all that apply):*

- Development of sampling design
- Conducting billing analysis
- Conducting lab or field studies

Guidelines Review and Development

Tool Development

*Please specify tools that your firm has specific expertise (check all that apply):*

- Building energy simulation models
- Statistical programs
- Other

Market Research and Analysis

#### **Additional Comments**

*Using the space below, please list specific examples of projects that demonstrate your firms experience in the areas checked above. Please keep as a short list (details should be left to the proposal).*