



# Request for Qualifications

Lighting Controls Training Support

9/18/2024

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# DEFINITION OF TERMS AND ACRONYMS

Below are commonly used acronyms and definitions, along with links to specific documents that are often referenced in the market transformation work supporting this RFQ.

Acronym / Term	Definition
<b>CEE</b>	Center for Energy and Environment
<b>ETA</b>	<a href="#">Efficient Technology Accelerator</a> – This is the name of the piece of legislation passed in 2022 that has allowed CEE to launch a statewide market transformation program
<b>LLLC</b>	<p>Luminaire-Level Lighting Controls</p> <p>LLLCs are a subset of networked lighting controls systems where individually programmable luminaires are utilized that contain embedded sensors and compact control components.</p> <p>The Design Lights consortium (DLC) developed and maintains the Networked Lighting Controls (NLC) Qualified Products List (QPL), which includes systems which support luminaire-level control, identified in the LLLC column of the QPL. This list can be found at <a href="http://www.designlights.org/lighting-controls">http://www.designlights.org/lighting-controls</a>.</p>
<b>RFQ</b>	Request for Qualifications
<b>TRM</b>	Technical Reference Manual
<b>Utility Stakeholders</b>	Minnesota Utilities funding the Minnesota Efficient Technology Accelerator (ETA) that serve on the ETA Coordinating Committee

# INTRODUCTION

## *CEE Background*

Center for Energy and Environment (CEE) is an independent, mission-driven, nonprofit organization that works to promote the responsible and efficient use of energy and natural and economic resources. CEE has over 30 years' experience helping households and businesses in Minnesota use energy efficiently and spend less money doing so. We collaborate with utilities, governments, nonprofits, and others to deliver actionable research and innovative programs that reduce energy waste and harmful emissions. We have established a national reputation for innovation and excellence in technical research, program development and implementation, community engagement, policy advocacy, and project financing.

## *ETA Overview*

Launched in 2023, Minnesota's Efficient Technology Accelerator (ETA) is a statewide market transformation program that accelerates deployment and reduces the cost of emerging and innovative efficient technologies, bringing lower energy bills and environmental benefits to all Minnesotans. Market Transformation is a program strategy that identifies emerging energy efficient technologies and accelerates their adoption by engaging in the market early, working with industry stakeholders to identify and overcome market barriers, and facilitating accelerated adoption of the technology to create lasting change in the market. The goal of this type of intervention is to shift a technology's market adoption curve to result in higher levels of adoption earlier.

## *Overview of LLLC*

As part of ETA, the LLLC initiative seeks to accelerate the market deployment and adoption of LLLCs in commercial and industrial buildings for new construction, major renovation, and retrofit projects.

LLLCs are a type of networked lighting control (NLC) that are connected systems of luminaires that individually contain control and sensor components. LLLCs simplify lighting controls design and installation by reducing the quantity of components installed onsite since they are contained within the fixture itself. Additionally, many LLLCs leverage wireless communications, eliminating the costly requirement to pull dimming and communication wire in existing buildings and eliminates most installation troubleshooting on all projects. By enabling precise control over lighting, LLLCs enable efficient energy management by implementing strategies like motion control, daylight harvesting, high-end trim, scheduling, and personal controls. Integration with external systems can lead to even deeper savings, utilizing demand response for load shedding, informing HVAC systems when spaces are vacant or occupied, and more.

## *RFQ Summary*

The purpose of this Request for Qualifications (RFQ) is to solicit qualifications and billing rates from consultants and firms with a deep knowledge of lighting controls and applications for commercial and industrial buildings. In support of the LLLC initiative, CEE is seeking to establish a short list of qualified consultants or firms to provide subject matter expertise in lighting controls, content development for training, and training delivery. This expertise will assist with the development and delivery of training content and additional resources to support the adoption and proper use of lighting controls.

We expect to contract with one or more consultants or firms over the next few years as we further define our curriculum development needs. Projects will be parsed out as needed and will have clearly defined deliverables as we continue to develop the training strategy incrementally. Services are expected to begin in late fall 2024 and continue through 2026, possibly extending to 2027. Appendix A includes a sample of CEE's standard Master Service Agreement that will be executed with organizations selected to perform the work.

## RFQ Schedule

Event	Date
RFQ released	September 18, 2024
Bidder questions due*	September 30, 2024
Optional bidders call	October 2, 2024
Answers to questions emailed*	October 4, 2024
Written responses due*	October 11, 2024
Finalists selected	October 25, 2024

\*All due dates will occur on the specified date at 5 p.m. CST.

# OBJECTIVES

CEE is seeking qualified consultants or firms to provide subject matter expertise in lighting controls to assist with the development and delivery of technical training content and additional resources that support the practical adoption and proper use of lighting controls. Consultants or firms should have experience with communicating essential concepts about how lighting controls and lighting controls systems work and the energy efficiency benefits of various lighting control technologies and strategies, including LLLCs, through at least one of the following: system and application design, specification, construction documentation, technical writing, presentations, digital tools, e-learning, and/or graphic design. Consultants should have extensive knowledge of lighting controls and applications for commercial and industrial buildings. The consultant will work closely with the LLLC team throughout the design and development process.

While the primary focus of this RFQ is to identify qualifications focused on developing and delivering technical training content, CEE is also interested in obtaining qualifications to provide visual design and e-learning development to simplify complex technical concepts into clear visual presentations and digital tools to support training. Examples include graphic designs, technical illustrations, videos, motion graphics, information sheets, flow charts, diagrams, etc.

## Potential Activities

The LLLC Initiative has identified several training opportunities, tools, and resources to strengthen market adoption of this technology. We anticipate the consultant would help with these functions:

- Design, develop, and deliver training content and additional resources to support the practical adoption and proper use of lighting controls and their energy savings strategies including the effective use of LLLCs.
- Work collaboratively with the team to develop learning strategies for identified audiences, create learning objectives, and develop course content and visual assets.
- Review design strategies, assumptions, and methodologies to ensure appropriate and reasonable outcomes.
- Utilize style guide and brand standards when provided.

Appendix B contains a list of potential topics and deliverables CEE could secure, broken down by topics, learning objectives, and audiences envisioned, along with an estimated date for when we anticipate the need to develop these materials. We do not expect you, your company, or firm to have all the skills listed. For simplicity in responding to this RFQ, an [Intake Application](#) form is attached that provides the opportunity to match your experience, skills, and areas of expertise with the requirements of our upcoming projects.

# QUALIFICATIONS

CEE is seeking qualifications from a variety of consultants or firms with the following skills and expertise. In your proposal, please list which skills you provide.

- Technical background in networked lighting controls including LLLCs and their applications in commercial and industrial buildings
- Technical background in visual design for training, educational, or informational purposes
- Experience in instructional design, technical writing, training, and content development
- Experience in one or more area of graphic design: technical drawings or illustrations, motion graphics, slide design, data visualization, animations, video production/editing, and/or digital tool development
- Technical understanding of commercial lighting and lighting controls and how it relates to MN Building Codes, including Energy Code, especially ASHRAE 90.1 – 2019
- Proven ability to manage design projects from conception to completion

## *Preference Criteria*

In addition to the bidding requirements, CEE strives to afford opportunity in its procurement practices to businesses that are small and/or locally owned, woman-owned, veteran-owned, minority-owned, LGBTQ-owned, and/or rurally located; or owned by a person with a disability or member(s) of any socially and/or economically disadvantaged community.

We welcome applications from all people and businesses and encourage responders to complete the optional Diversity, Equity, and Inclusion section in the [Intake Application](#) form.

Additionally, if your organization is listed on any of the following certifying agencies, please include proof of certification:

[Met Council](#)

[CERT](#)

[Equity in Procurement \(TG/ED/VO\)](#)



# PROPOSAL SUBMISSION

## *Question and Proposal Submission*

Questions are due via email by 5 p.m. CST on September 30, 2024. CEE will also be hosting an optional bidders call on October 2, 2024, to review the scope of work and expectations and answer clarifying questions.

Final proposals are due via email by 5 p.m. CST on October 11, 2024. Please include the full proposal and all appendices as one document.

**Send all questions and proposals to [SCALE@etamn.org](mailto:SCALE@etamn.org).**

## *Step 1: Intake Application Form*

First, complete the attached [Intake Application](#) by responding to the following sections: Company Contact Information, Preference Criteria (optional), and Skills and Technical Expertise. This form gives you the opportunity to match your experience, skills, and areas of expertise with the requirements of our upcoming projects. We do not expect you, your company, or firm to have all the skills listed.

**Once the [Intake Application](#) is complete, enter “Submit” and the application will be automatically sent to CEE. We will combine it with your proposal.**

## *Step 2: Proposal Format*

In addition to submitting the Intake Application, proposals should be limited to no more than 8 pages in total length, not including samples, and should contain the following components.

1. **Executive Summary** – Summarize the proposed strategy for delivering the services sought and reasons that CEE should select your team.
2. **Qualifications** – List your relevant qualifications, years of experience, and efforts for similar work.
3. **Project team** – Provide brief biographies for key personnel, including their roles, qualifications related to the skills/tasks being proposed, years of experience, and efforts on similar work.
4. **References** – Provide up to three client references for relevant work experience. Please provide the following for each.
  - a. Client company name
  - b. Client contact name, email and phone number, and dates services performed
  - c. Summary of services performed
5. **Billing Rates** – Provide a table with proposed hourly billing rates for all personnel or position(s) involved for the remainder of 2024, 2025, and 2026.
6. **Appendix** – This section is optional and may include exhibits of similar work, letters of recommendation, etc. If you add appendix information, we ask that you keep the information relevant to the services being proposed.

# APPENDIX A: MASTER SERVICE AGREEMENT

2024 CEE Mater Agreement Draft – for RFPs

# APPENDIX B: POTENTIAL TOPICS & DELIVERABLES

RFQ Potential Topics & Deliverables