



**EFFICIENCY MAINE TRUST
REQUEST FOR QUALIFICATIONS (RFQ) TO PROVIDE
VARIOUS ADVERTISING, EDITING,
GRAPHIC DESIGN, AND WEBSITE SUPPORT SERVICES**

RFQ EM-018-2024

Date Issued: February 9, 2024

Responses Due: March 22, 2024, 11:59 p.m. Eastern Time (US)

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Separate attachments:

Attachment A – Hourly Rates

Attachment B – Standard Agreement

Attachment C – Limited Scope Services Agreement

Attachment D – Team Commitment Form

Attachment E – Confidentiality, Non-Disclosure and Protective Agreement

SECTION 1 – RFQ INFORMATION AND INSTRUCTIONS

1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks qualified bidders or teams of bidders to provide various advertising, editing, graphic design, and website support services to help the Trust market its programs and report on its activities. Interested parties are asked to present their qualifications to provide one or more of the following communication services: advertising, including media coordination; editing, in particular report document production and editing; graphic design; and website services, including design and development. This RFQ is expected to establish a pool of prequalified professionals that the Trust may engage, at its discretion, to assist the Trust with discrete projects or targeted outreach campaigns across the Trust’s programs and activities. The Trust’s target is to select up to three firms per category but may, at its discretion, select more or less than this target.

1.2 Designated Contact Person for this RFQ

Kate Rankin
 Director of Communications
 Efficiency Maine Trust
 168 Capitol Street, Suite 1
 Augusta, ME 04330-6856
 Phone: (207) 512-5905
 Email: kate.rankin@efficiencymaine.com

1.3 Schedule

	Milestone	Date/Deadline
1	RFQ Issued	02/09/2024
2	Questions Due	02/23/2024
3	Responses to Questions Posted	03/01/2024
4	Responses Due	03/22/2024, 11:59 p.m. Eastern Time (US)
5	Anticipated Decision Date	04/05/2024
6	Anticipated Contractor Start	Dependent on the project

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFQ schedule and pre-bid activities, including responses to questions, will be posted on the RFQ EM-018-2024 webpage at <https://www.efficiencymaine.com/opportunities/rfq-em-018-2024/>.

1.4 Prequalification Term

The Trust will prequalify selected contractors for a duration of up to two years from the date of its execution. The Trust reserves the right to negotiate an additional one-year renewal with the selected contractors.

1.5 Submittal Deadline

All responses must be submitted electronically via the online Submission Form on the RFQ EM-018-2024 webpage (<https://www.efficiencymaine.com/opportunities/rfq-em-018-2024/>). Submissions must be

received by the due date and time specified in section 1.3. Bidders will receive a time-stamped confirmation email when their proposals are submitted. (Note: There may be a delay of a few minutes between submission and this confirmation email). Any proposal received after the deadline will not be considered. Proposals must be complete when submitted; changes or additions will not be accepted after the specified due date and time, except for any clarifications requested of bidders by the Trust. The Trust encourages bidders to submit their proposals with sufficient time to account for any technological challenges (e.g., Internet disruptions).

1.6 Submitting Questions

It is the responsibility of all bidders and other interested parties to examine the entire RFQ and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFQ must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due date for questions noted above in section 1.3. The subject line of the email should be: "Request for Qualification (RFQ) to Provide Various Advertising, Editing, Graphic Design, and Website Support Services." Responses to questions will be posted on <http://www.efficiencymaine.com/opportunities/rfq-em-018-2024>, as will all clarifications and amendments released in regard to the RFQ. It is the responsibility of all interested parties to check this website periodically to obtain clarifications and amendments. Only those clarifications and amendments posted on this website are considered binding.

1.7 Proposal Confidentiality

Bidders should be aware that information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Bidders should assume that all information submitted in response to this RFQ will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

1.8 Prequalification Decision

The Trust will notify all bidders by email of the contractors that are selected as prequalified providers under this RFQ. The Trust reserves the right to negotiate the final terms and conditions winning bidders whose packages are selected by the Trust, and to reject any winning bidder with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment. The Trust reserves the right to reject any response that does not meet these requirements.

1.9 Contracting Process

The selection process is governed by the Efficiency Maine Trust Rule Chapter 1: Contracting Process for Service Providers and Grant Recipients, which can be found on the Trust's website: <http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

Prequalified contractors may be asked to assist the Trust on various marketing, reporting, and other communications projects as needs arise. The Trust will request support based on past experience or qualifications for the task, or request quotes for specific Scopes of Work (SOWs), or will notify the list of potential contractors about a project and select a contractor based on availability. All work assignments will be in the form of a Scope of Work (SOW) issued by the Trust. For a given SOW, the Trust shall have the right to request the services of specific individuals within the contractor's firm and shall have the right to seek services of other contractors if the requested individual is not available. Selected contractors have no

guarantee of receiving any SOWs during the term of the contract; there is no obligation of the Trust to provide any equitable distribution of work.

1.10 Anticipated Contract Budget

Budgets will depend upon the nature and duration of the tasks required to complete the project. Contractor compensation will be based upon the bid hourly rates of the individual service provider(s) within the firm, plus approved expenses. Each project will be executed through a specific SOW on a time-and-materials basis with a not-to-exceed maximum value for each individual SOW. Where appropriate, fixed-price contracts may be negotiated. It is anticipated that individual SOW budgets for smaller projects will range from \$3,000 to \$15,000. Larger projects may be sent to the prequalified list of consultants for estimates and assigned based on experience, expertise, capacity, concept, availability, and cost.

1.11 RFQ Process – Reservation of Rights

The Trust reserves the right to cancel or extend the RFQ process at any time, and to issue clarifications and amendments to the RFQ. The Trust also reserves the right to reject noncompliant submissions in response to this RFQ. The Trust, in its sole discretion, reserves the right to recognize and waive minor informalities and irregularities found in proposals received in response to this RFQ. Issuance of this RFQ does not commit the Trust to make an award. The Trust will not pay any costs or expenses incurred by a bidder in connection with preparation of a response to this RFQ.

1.12 Contract Agreement

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFQ is provided as **Attachment B – Standard Agreement**. A copy of a simplified contract that might be used for limited duration tasks, lower value contracts, and certain types of projects with sole proprietors is provided as **Attachment C – Limited Scope Services Agreement**. One of these documents will complete the agreement for services between a prequalified contractor and the Trust. The prequalified contractor and its agents and subcontractors will be required to execute a nondisclosure agreement (provided as **Attachment E – Confidentiality, Non-Disclosure and Protective Agreement**). Certain information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.

1.13 Request for Reconsideration

An aggrieved person may request a hearing for reconsideration of a prequalification decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of prequalification. Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Trust's website under Documents and Services:

<http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>

SECTION 2 –BACKGROUND INFORMATION

2.1 Efficiency Maine Trust

The Efficiency Maine Trust (the Trust) is the independent, quasi-state agency established to plan and implement energy efficiency programs in Maine. Through its suite of nationally recognized programs, The Trust provides consumer information, marketing support, demonstration pilots, discounts, rebates, loans, and other initiatives to promote high-efficiency equipment and operations that help Maine’s homes, businesses, and institutions reduce their energy costs and lower their greenhouse gas emissions. The result is job growth, better grid reliability, improved energy independence, a stronger local economy, and critical progress toward meeting the State’s climate change goals. The Trust is governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

2.2 RFQ Background

The Trust markets its programs to potential customers through tailored outreach campaigns within and across its programs for residential and business customers. These efforts are complemented by the Trust’s Public Information and Outreach initiatives, which seek to increase general awareness of the benefits of cost-effective, customer-sited energy resources, and of specific efficient technologies, operating practices, and behaviors. These initiatives also provide basic guidance on how to access Efficiency Maine programs. Through numerous communications channels, the Trust urges consumers who are planning to purchase new lighting, appliances, heating systems, and other equipment to consider buying one of the more energy-efficient models available.

Information is disseminated through the Trust’s website; printed flyers and brochures; print, digital, and radio advertising; social media, videos, and other multimedia tools. The Trust also manages targeted training sessions and attends industry events, such as trade shows, forums, and symposiums.

In addition, the Trust must report on, and plan, these initiatives in formal documents presented to its Board, the Public Utilities Commission, the Legislature, and others. This RFQ also seeks document production, substantive editing, and copyediting support for these reports.

2.3 Additional Sources of Information

Following are links to additional information that bidders may find helpful in preparing a response to this RFQ:

TITLE	LOCATION (link)
Efficiency Maine Trust website	www.energymaine.com
Efficiency Maine Trust Annual Reports	https://www.energymaine.com/about/library/reports/
Efficiency Maine Trust – Triennial Plan	https://www.energymaine.com/about/library/policies/
Efficiency Maine Facebook page	https://www.facebook.com/EfficiencyMaine/

SECTION 3 – POTENTIAL SERVICES AND ASSIGNMENTS

The Trust is seeking contractor(s) to provide services or complete assignments in the following areas:

1. Advertising (e.g., designing and implementing advertising campaigns, traditional media buys, digital ad campaign development and management, and general advertising project coordination)
2. Editing services (e.g. copyediting, substantive editing, and document production services)
3. Graphic design services (e.g., brochures, illustrations, images, maps, point-of-purchase signage, print ads, digital ads, website graphics, conference display materials, mailings, data visualization projects or infographics, and print coordination)
4. Website services (e.g., webpage development, responsive design, web tool development, development of software tools and/or Apps, website maintenance, and website security)
5. Third-party marketing Software as a Service (SaaS) support (e.g. development, maintenance, and integration through API third-party application solutions)
6. Radio ad creation (e.g., radio spot script writing, talent acquisition, production, and trafficking)

Contractor(s) may bid to provide services in one or more of these areas and must indicate which services they are offering to provide under this bid, as well as their qualifications and rates associated with the specific services. Contractor(s) should also describe their willingness, ability, and approach to coordinating with other subcontractors selected by the Trust to support a single project covered under this RFQ.

Proposed personnel should have demonstrated experience, expertise, and capacity in the service area or areas included in the bid. For the editing services category, proposed personnel must demonstrate experience with editing and document production of lengthy, technical reports in accordance with editorial policies or standards. Previous experience with energy efficiency or governmental reports is highly preferred. For the website category, proposed personnel must demonstrate experience in website and website tool development, including a proficiency in HTML 5, CSS 3, PHP, WordPress, JQuery, and JavaScript. The Trust may select individuals or firms based on their expertise or capabilities within distinct areas of specialization to provide services to discrete tasks; expertise in all potential service areas is not required and bids need not include all service areas.

SECTION 4 – PROPOSAL REQUIREMENTS

4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFQ EM-018-2024 webpage (<https://www.efficiencymaine.com/opportunities/rfq-em-018-2024/>.) All proposals must adhere to the instructions and format requirements outlined in this RFQ, in the online Submission Form instructions, and in the written supplements and amendments issued by the Trust.

The online Submission Form will request the following documents:

- RFP response
 - PDF format file named “Proposal_Bidder_Name_RFQ_018_2024”
- Attachment A – Hourly Rates
 - Excel format file named “Project_Cost_Bidder_Name_RFQ_018_2024”
- Suggested redlines to Attachment B - Standard Agreement [if applicable]
 - Word format file named “Standard_Agreement_Bidder_Name_RFQ_018_2024”
- Suggested redlines to Attachment C – Limited Scope Services Agreement [if applicable]
 - Word format file named “Limited_Scope_Services_Agreement_Bidder_Name_RFQ_018_2024”
- Attachment D – Team Commitment Form [if proposal involves any subcontractors]
 - PDF format file named “Team_Commitment_Bidder_Name_RFQ_018_2024”
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate) [if applicable]

4.2 Format Requirements

Submissions will be evaluated for adherence to the following format requirements:

- Qualifications package must be typewritten.
- Pages must be numbered.
- Unnecessary attachments (e.g., any attachments beyond those sufficient to present a complete, comprehensive, and effective qualifications package) will not be considered in the evaluation of the submission.
- Qualifications package must adhere to prescribed page limits specified in this RFQ. The Trust values concise proposals.

4.3 Team Organization and Staffing Requirements

Qualification packages that include teaming arrangements must designate one party as the lead bidder. Personnel who are proposed shall be the actual project performers. Bidders may not substitute personnel without prior written approval of the Trust. Other participating team members or sub-contractors must complete Attachment D – Team Commitment Form.

4.4 Content and Organization Requirements

Bidders may submit qualifications for one or more service areas outlined in section 3 and must clearly indicate which service areas apply. The qualifications package must include the following contents, which should be presented in the following order:

1. **Company Profile:** Provide an overview of the company including location, number of staff, services provided focusing on company, company experience, and company qualifications. Please highlight energy efficiency experience, as relevant. (2 pages maximum per company on the team)
2. **Individual Experience/Qualifications:** Identify the proposed personnel and their qualifications and capabilities to provide services within the relevant areas identified in section 3 of this RFQ. Please highlight energy efficiency experience, as relevant. (1 page per person maximum)
3. **Management Approach:** Describe processes to ensure that assigned tasks will be completed on time, on budget, and with high quality and accuracy. (1 page maximum)
4. **Hourly Rates and Expenses:** Provide hourly rates and costs for all personnel, including any subcontractors, in an Excel-compatible format using the **Hourly Rates** template provided as Attachment A to this RFQ. Please provide rates by person, title, and service/activity. Please provide rates by program year (July 1 – June 30) for FY2025 and FY2026.
5. **References:** Provide names, addresses, email addresses, and telephone numbers of representatives of three current or recent clients for whom the firm has provided services similar to those in this RFQ (3 references per company on the team).
6. **Project Examples:** Provide 3 to 5 project examples (web links or attachments) that highlight your qualifications, in particular experience with energy efficiency.

SECTION 5 – EVALUATION CRITERIA

Submissions that meet the requirements established in the RFQ will be evaluated by a review team. The Trust reserves the right to decide whether a proposal is acceptable in terms of meeting the requirements of this RFQ and to accept or reject any or all submissions received.

The review team will evaluate the following aspects of the proposals when reviewing and ranking the submittals:

Scoring Category	Maximum Points
1. Qualifications and expertise of the firm and relevant experience of proposed personnel	30
2. Quality of portfolio and relevant past projects	40
3. Rates	30
Total	100

In evaluating qualification packages, the Trust reserves the right to take any of the following steps, with respect to either all of the submissions received or to a subset of submissions selected as superior to the others: (1) consult with prior clients on the performance of the bidder or of particular persons proposed for this bid; (2) schedule presentations or interviews with representatives of the bidder or persons proposed for the project; (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the bidder's performance; and (4) request additional data or supporting material.