

As of 4/11/16

RFQ EM-006-2016
Questions and Answers Regarding
Request for Qualifications for Various, Marketing, and Logistical Support Services

1. **Q: Is there an incumbent who may be expanding their role, or if this is a new area where Efficiency Maine has no current or preferred supplier?**

Q: Does the Trust have a current “marketing firm/agency of record” with whom these deemed firms would collaborate with in any fashion?

A: The Trust has primarily procured communications and marketing support through program delivery contracts. For example, the Consumer Products Program delivery contract included marketing support for consumer product marketing activities. There have been a number of marketing and communications professionals and firms supporting those activities over the years. Contractors or firms selected through this RFQ will be working directly with Efficiency Maine Trust staff and may be asked to collaborate with firms providing program delivery services.

2. **Q: You mention in Section 1.8 that in FY2017 the Trust plans to transfer management of many communications and design efforts from individual program delivery teams to the Trust itself. Can you clarify what [amount and type(s) of] work will remain under delivery team contractors and what will be centralized under the Trust?**

A: At this time, there is no set amount or type of work that will fall under the direct management of the delivery teams. If additional management or production capacity is required, the Trust may call upon delivery teams to manage and/or execute certain communications or marketing projects. The Trust also may rely on delivery teams where their expertise is well-suited to a particular activity.

3. **Q: Section 5.4.g: Can I use you (Efficiency Maine) as a reference?**

A: As a practice, the Trust does not act as a reference for contractors but may be listed as a past/current client.

4. **Q: Section 6.1: The evaluation criteria are not weighted (as provided for in Section 2.B.1.c of the Contracting Process for Service Providers and Grant Recipients). Can you please weight them?**

A: Following are the qualification package evaluation criteria and scoring weights to be applied:

- Qualifications and expertise of the firm (or sole proprietor) and relevant experience of proposed personnel – 30%
- Quality of portfolio and relevant past projects – 40%
- Rates – 30%

5. **Q: The wording on contract duration in Section 1.7 and Section 7.2 is not the same. Section 1.7 says contract is for 3 years, subject to annual review. Section 7.2 says the contract is for 2 years, with a negotiable additional year.**

A: The intent of Sections 1.7 and 7.2 is that the Trust would issue prequalification contracts to selected firms, at the rates specified, for a possible prequalification period of up to 3 years; a two-year base prequalification term with a possible one-year renewal by agreement of the parties. During the period of prequalification, the Trust may issue specific work assignments to selected firms pursuant to a Statement of Work, in the Trust's sole discretion.

6. **Q: Given this is a Request for Qualifications to provide various communications, marketing, and logistical support services, does Efficiency Maine Trust envision a follow-up RFP to follow?**

Q: If a firm is deemed qualified, will Efficiency Maine Trust issue individual RFPs on a per project basis or will the Trust assign firms to work on individual scopes and projects?

A: Each project will be executed through a specific Statement of Work (SOW) on a time-and-materials basis with a not-to-exceed maximum value for each individual SOW. For a given SOW, the Trust shall have the right to request the services of specific individuals within the consultant's firm and shall have the right to seek services of other consultants if the requested individual is not available. SOWs for larger projects will be sent to the prequalified list of consultants for estimates and assigned based on experience, expertise, capacity/availability, approach, and cost. Smaller projects may be assigned directly to prequalified firms or contractors based on experience, cost, and availability. Selected consultants 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.

7. **Q: 3.6 Market research – “conducting customer satisfaction surveys” – What types of lists are you able to provide? Email? Mail? Phone?**

A: Contact information is available for past participants in Trust efficiency programs. The Trust may provide additional lists, where available, to support market research.

8. **Q: 3.7 Media coordination – is development of TV ads/video and related placement a consideration? Has this medium been used in the past?**

A: The Trust has produced a number of videos available on the Efficiency Maine website (<http://www.energymaine.com/energyinformation/videos/>). The Trust has produced a number of shorter videos for use as advertisements on Hulu and YouTube. The Trust has not placed an ad on broadcast television for several years.

9. **Q: 4.1 Call Center coordination – where is your call center located?**

A: The Call Center is currently located in Brunswick, Maine. Coordination may include notifying the Call Center Team about an upcoming advertising campaign or working on an outbound call campaign for market research purposes.

10. Q: Can we assume any website updates would be made by your team?

A: Yes. The Trust's website utilizes a framework that allows most updates to be made internally. Certain updates and/or programming may be completed by a subcontractor as part of a standing RFQ for Website Services. The Trust may provide log-in access to contractors answering this RFQ (e.g., if graphic design work was completed for the website, it could be uploaded by Trust staff, a website services contractor, or the graphic designer).

11. Q: What related expenses are typically outlined in RFPs? Without knowing specifications for the projects, these are hard to define at this time. For example, is this operating and admin support costs as a function of doing business?

A: The Trust anticipates that most bids will be for hourly rates and material costs (e.g., brochure printing) as part of a time and materials contract. Operating and administrative costs should be reflected in hourly rates.

12. Q: How many firms do you typically have within the pool of suppliers?

A: This RFQ is the broadest communications-related RFQ we have had to date. The Trust hopes that several professionals or firms can be prequalified under each specialty area.

13. Q: Do you have any special qualifications that you are looking for firms to have? Such as women-owned, minority-owned, or in-state vendor certifications.

A: No. The selection of service providers and grant recipients 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>.

14. Q: The RFQ states that respondents must present content in the prescribed order A-I. Should we choose to submit for multiple services, are submissions for items A-G required in duplication (understanding that items H and I are unique per service submission)?

A: No. One copy of the company profile and other items will suffice. However, please be clear about how item d (individual experience) and item f (individual hourly rates) apply to each service area.

15. Q: Can proposals be submitted via email (as is provided for in Section 2.E of Efficiency Maine's Contracting Process for Service Providers and Grant Recipients) or is the hard copy requirement firm?

A: The hard copy requirement is firm.

16. Q: Is the Section 5.4.c Company Profile required for sole proprietor submissions?

A: No. For sole proprietors, the individual experience satisfies the requirement for a Company Profile.

17. Q: The RFQ is clearly geared toward firms, not sole proprietors. Are there any differences in requirements for submissions between the two types of entities? For example, is there a simplified version of Attachment C? Can some new or revised language be added to the RFQ to clarify what sole proprietors need to do that's different from what firms need to do?

A: The Trust has worked with sole proprietors in the past and anticipates working with sole proprietors through this RFQ. Submission guidelines describe a maximum for content, not a minimum. Attachment B, the Trust's standard contract, is most applicable to larger projects; a shorter agreement may be used for shorter term support. Bidders can modify Attachment C to reflect their work. In many cases, a bidder may only be submitting one line in the Excel sheet. An example was included to allow bidders to reflect that they may have different rates for different tasks or team members.

18. Q: Attachment C – Cost Form provided with the RFQ does not appear to follow the required rate schedule and service areas referenced in the RFQ. Based on the required rate schedule, will bidders be required to complete and submit Attachment C?

A: Attachment C was left deliberately blank so bidders could enter services and team member rates according to the service areas included in the bid. Please complete Attachment C so the review team may compare rates between submissions.

19. Q: If bidders are submitting qualifications for multiple tasks, must they all be presented within the 2 page limit stipulated for letter of transmittal and company profile? Or should separate letters be submitted for each task?

A: The 2-page limit applies to each specialty area. There is no need for separate letters of transmittal or company profile.

20. Q: Regarding Section 5.4-h Samples: Are you looking for three distinct samples for each Service Area (three for Advertising, three for Copywriting etc.) or will you accept samples that show combined expertise (e.g. samples of an ad campaign where the bidder also wrote the copy)?

Q: Can you confirm if we can submit three work samples and an overview for each area that we are bidding on (i.e., one for advertising, one for media placement, one for copywriting, etc.), or do you want our examples to be integrated if we're capable of handling all marketing aspects?

A: The Trust will accept examples that demonstrate combined expertise, but please list the example under each relevant area of expertise (e.g., the same brochure could be listed under copy writing and graphic design services). The review committee will prequalify one or more professionals or firms in each distinct category. Applications should be submitted in such a way that the committee may consider an applicant in a category independent of the other categories.

21. Q: The RFQ states that in their qualifications package respondents must include, "at least three samples of recent work pertinent to the expertise for which the bidder is submitting

qualifications and rates." Would a web landing page that contains these samples be an acceptable method of submission?

A: Yes, but please make it clear which area(s) of expertise the samples demonstrate.

22. Q: What is your expectation/what would you like to see for samples of Editing Services?

Q: What qualifies as a "sample" for copyediting and/or editing services? Do you want marked-up Word files (which might run into confidentiality issues with other clients)? Hard copies of final documents? URLs of posted edited work?

A: If it is not possible to submit before and after samples of written work, examples of completed projects will suffice. They may be submitted as hard copies or as links. Samples should be chosen that reflect the professional's or firm's significant contributions to the final product.

23. Q: In order to provide applicable work samples, will RFQ EM-006-2016 to provide various Communications, Marketing and Logistical Support Services to Efficiency Maine Trust only pertain to energy efficiency programs or all of the Trust's marketing needs?

A: The vast majority of the Trust's marketing needs are for its energy efficiency programs. Some communications projects are more organizational in nature (e.g., Efficiency Maine's Annual Report or monthly newsletter).