



## **CALL FOR PROPOSALS: STRATEGIC PLANNING SERVICES FOR THE IOWA ASSOCIATION FOR ENERGY EFFICIENCY**

### **1. Introduction**

The Iowa Association for Energy Efficiency (IAEE) invites qualified consultants to submit proposals for facilitating a comprehensive strategic planning process to guide our organization's mission, goals, and operational focus for the next three to five years. As Iowa's leading advocate for energy efficiency and sustainable energy solutions, IAEE seeks to define a forward-thinking roadmap that aligns our resources with evolving industry demands and enhances member value. The selected partner will facilitate stakeholder engagement, conduct a situational analysis, and develop actionable strategies to strengthen our impact.

### **2. Proposals**

- **Proposals due by 5:00 PM on May 27, 2026.** Proposals should be submitted via electronic submission in PDF form to the IAEE Executive Director at [shull@iowaenergy.org](mailto:shull@iowaenergy.org). Proposals submitted after this date and time will not be considered.
- Proposals are limited to nine (9) pages in length and should include:
  - Overview of the Proposer's Organization (1 page)
  - Summary of the project team (2 pages - Resumes can be submitted as an attachment and will not count toward the page limit)
  - Project timeline – presented in Gantt chart form (1 page)
  - Project Approach (3 pages)
  - Project Budget (1 page)
  - Professional References – Provide three references (1 page)

### **3. Interviews**

Interviews will be conducted with short-listed proposers. Interviews may be in person or virtual. All short-listed proposers will be interviewed using the same means and methods to ensure fairness in the interview process. Interviews are intended to clarify technical approaches, validate past performance, and ensure alignment with the strategic planning goals of the Association.

### **4. Purpose**

The purpose of this project is to facilitate the development of a comprehensive strategic plan that will:

- Define IAEE's vision for the next three to five years.
- Identify goals and objectives.
- Maximize existing membership and identify new membership opportunities.
- Outline actionable strategies and initiatives.
- Establish metrics for measuring successful plan implementation.
- Enhance IAEE's capacity to advance energy efficiency in Iowa.

## 5. Project Objectives

The project will achieve the following objectives:

- Conduct a thorough assessment of IAEE's current state, including its strengths, weaknesses, opportunities, and threats (SWOT analysis).
- Engage key stakeholders, including IAEE board members, staff, members, and partners, in the planning process.
- Develop a clear and concise strategic plan document.
- Provide IAEE with a framework for implementing and monitoring the strategic plan.
- Complete the plan by October 5, 2026.

## 6. Scope of Services

The consultant will provide the following services:

- **Project Management:** In cooperation with the Executive Director and the Executive Committee of the Board, coordination and management of the strategic planning process, including scheduling, communication, and deliverable tracking.
- **Meeting Facilitation:** Design and facilitation of three interactive meetings with IAEE stakeholders.
- **Data Gathering and Analysis:** Collection and analysis of relevant data, including organizational documents, stakeholder input, and industry trends.
- **Strategic Plan Development:** Draft, refinement, and finalization of the strategic plan.
- **Deliverable Preparation:** Preparation of meeting agendas, presentations, and other supporting materials.

## 7. Project Deliverables

The following deliverables will be provided to IAEE:

- **Meeting Agendas:** Agendas for each of the meetings, distributed in advance.
- **Meeting Presentations:** Presentations to be used during the meetings.
- **Meeting Summaries:** Summaries of key discussions, decisions, and action items from each meeting.
- **Draft Strategic Plan:** A draft strategic plan document for review and feedback.
- **Final Strategic Plan:** A final, approved strategic plan document.
- **Strategic Plan Presentation:** PowerPoint preferred.

## 8. Procurement and Project Schedule

The following schedule lays out the anticipated procurement and project schedule. This schedule is subject to change at the request of IAEE. Selected proposer should anticipate completing the project by October 5, 2026 at the latest.

Task	Short Description	Target Date
<b>Issue request for proposals</b>	<i>RFP issued and posted on website and socials</i>	04/22/2026
<b>Deadline for Questions</b>	All questions submitted by prospective proposers	05/06/2026
<b>IAEE Q&amp;A Response Issued</b>	Answers issued by IAEE	05/15/2026
<b>Proposal Submission</b>	All proposals due by 5:00 PM CT	05/27/2026
<b>Proposal review and scoring Complete</b>	IAEE proposal review period	06/03/2026
<b>Conduct Interviews</b>	Virtual proposer interviews	06/17/2026
<b>Finalize selection and execute contracts</b>	Vendor selected	06/26/2026
<b>Strategic Planning Kick-Off</b>	Strategic planning starts during this week	07/06/2026
<b>Complete Strategic Planning</b>	Strategic planning must be completed by this date	10/05/2026
<b>Launch IAEE Strategic Plan</b>	Launch strategic plan at the IAEE Energy Summit	11/09/2026

## 9. Project Milestones Overview

The project will be completed over a three-month period, with the following key meetings and milestones:

- **Kick-Off Meeting and Initial Assessment**
  - Kick-off meeting with IAEE leadership.
  - Review of organizational documents.
  - Conduct stakeholder interviews.
- **Meeting 1: Foundational Alignment (Approximately 6 hours)**
  - Meeting with full board.
  - Present findings from initial assessment.
  - Conduct strategic planning exercises (SWOT, visioning, goal development).
  - Strategic issue identification.
  - Stakeholder analysis.
  - Distribute summary of outcomes to full board.
- **Meeting 2: Strategy Development (Approximately 4 hours)**
  - Meeting with full board.
  - Review outcomes from meeting 1.

- Refine vision and goals.
- Develop strategic priorities and objectives.
- Outline key strategies and initiatives.
- **Meeting 3: Plan Refinement and Action Planning (Approximately 4 hours)**
  - Meeting with full board.
  - Present the draft strategic plan.
  - Gather feedback and update the plan based on feedback
  - Develop implementation plan, timelines, responsibilities, and metrics.
- **Finalize and Distribute Plan**
  - Finalize the strategic plan.
  - Present the final strategic plan to the board.

## **10. Divergence from Scope**

The Scope of Services, Project Deliverables, and Project Timelines are negotiable. We refer to the proposer(s) expertise in strategic planning to provide guidance and direction on how to best achieve the purpose and objectives of this strategic plan.

## **11. Questions Prior to Submission Date**

Questions may be submitted to the IAEE Executive Director at [shull@iowaenergy.org](mailto:shull@iowaenergy.org) by noon, [Enter weekday], [Enter Date]. A Questions and Answers document will be compiled and distributed to all recipients of the proposal on [Enter Date].

## 11. IAEE Responsibilities

IAEE will be responsible for:

- Providing access to relevant organizational documents.
- Identifying and securing participation of key stakeholders.
- Providing timely feedback on deliverables.
- Participating actively in the meetings.
- Approving the final strategic plan.

## 12. Project Budget

The total budget for the services outlined in this scope of work is negotiable. See Appendix A for payment terms.

## 13. Project Scoring

Proposals received will be scored using the following scoring rubric:

Scoring Category	Maximum Points Awarded
<b>Project Team:</b> Proposer provides thorough review of the project team, demonstrating experience and expertise commensurate with fully executing the scope of the proposal and in producing high quality deliverables.	15
<b>Project Approach:</b> Proposer provides a clear description of the strategic planning process. Responsibilities of the proposer and IAEE board members and stakeholders are clearly defined. Core services vs optional services are clearly defined.	25
<b>Project Timeline:</b> Project timeline is realistic and achievable, demonstrating an understanding of IAEE's volunteer board constraints and intentions for the work to be completed by the annual meeting to be held at the 2026 Iowa Energy Summit.	20
<b>Budget:</b> Budget is reasonable and clearly defines the cost of services to be provided, including a breakdown of costs by task. Cost	40

of additional or optional services is clearly defined.	
<b>Bonus:</b> Proposal provides additional services or optional services beyond those required in the call for proposals that add value to the strategic planning process or its implementation.	5

**14. Terms and Conditions**

This scope of work is subject to the terms and conditions outlined in the [Agreement Name].

**15. Acceptance**

Please sign and return a copy of this Call for Proposals with your proposal to indicate acceptance:

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**Signature**

[Consultant Name]

[Title]

[Organization]

Date:

**Iowa Association for Energy Efficiency**




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**Signature**

Jeremy Caron

Board Chair

Iowa Association for Energy Efficiency

Date: [Enter distribution date]

## APPENDIX A: PROFESSIONAL SERVICES AGREEMENT

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**THIS AGREEMENT** for Professional Services (hereinafter “Agreement”) is made by and between [Enter Consultant Name] (hereinafter “XXX”) and **Iowa Association for Energy Efficiency** (hereinafter “IAEE”), whose address and phone number are:

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**FOR CONSIDERATION** of the mutual promises and covenants contained herein, [XXX] and IAEE agree as follows:

### 1. SCOPE OF WORK

- I. **Professional Services:** IAEE agrees to receive Professional Services (hereinafter “Services”) as described below in the Scope of Work from [XXX].

### 2. PERFORMANCE PERIOD

The performance period of this Agreement shall begin on the effective date, [Month day, year] and shall not extend beyond, [Month day, year], unless amended by written mutual agreement.

### 3. COMPENSATION AND PAYMENT

- I. **Fee:** IAEE agrees to pay [XXX], not to exceed \$XXXX for services to be billed in two increments, ½ billed on [Enter Date] and ½ billed in [Enter Date] for the term of this Agreement.
- II. **Invoice for Payment:** [XXX] shall submit an invoice and IAEE will send payment to:

[Enter Organization and Billing Address]

4. **CONFIDENTIALITY:** [XXX] agrees to keep confidential and not to disclose to third parties any information provided by IAEE pursuant to this Agreement. This provision shall survive expiration and termination of this Agreement.

**IN WITNESS WHEREOF**, the Parties hereto have caused this Agreement to be executed in duplicate as of the latest date set forth below.

**Iowa Association for Energy Efficiency**

**[Contracted Entity]**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

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Name

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