

**Request for Qualifications:  
RFQ # 50817  
Market Research Contractors**



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## 1. Introduction

The Northwest Energy Efficiency Alliance (NEEA) is an alliance of more than 140 utilities and energy efficiency organizations working on behalf of more than 13 million energy consumers. NEEA is dedicated to accelerating both electric and gas energy efficiency, leveraging its regional partnerships to advance the adoption of energy-efficient products, services and practices.

Since 1997, NEEA and its partners have saved enough energy to power more than 900,000 homes each year. As the second-largest resource in the Northwest, energy efficiency can offset most of our new demand for energy, saving money and keeping the Northwest a healthy and vibrant place to live. [www.neea.org](http://www.neea.org)

## 2. RFQ Background

The Market Research & Evaluation (MRE) team manages a large number of market research & evaluation projects in support of NEEA program teams. Recently the MRE team went through a rigorous process to qualify evaluation vendors because MRE believes that having a qualified group of vendors with documented competencies will enable NEEA to:

- Have a higher level of collaboration with our vendors
- Drive improved clarity and alignment around scope of work and expectation for deliverables
- Turn projects around faster, with a higher level of quality.

Although many of our evaluation providers also provide market research, the MRE team is interested in qualifying vendors based on their market research qualifications outside of the practice of evaluation. As such, this RFQ is being issued to:

- Our current list of qualified evaluation vendors,
- A list of market research vendors that we have identified through work and/or professional meetings, and
- An open posting on NEEA.org.

## 3. Objectives

NEEA is seeking to expand its pool of qualified market research contractors to bid on various upcoming market research projects. NEEA expects to notify eligible candidates of its decision by mid-December 2018. The purpose of this request is to provide NEEA with a group of qualified vendors who can quickly and effectively respond to requests for market research. NEEA intends to approve vendors for this pool who are qualified in any or all of the categories as defined in Section 5 of this document.

## 4. Background Information

NEEA's mission is to promote energy efficient products and practices in the Northwest region (ID, MT, OR and WA). As such, the products associated with our market research efforts often include lighting, water heating, HVAC, appliances, industrial equipment (motors, fans, blowers, etc.), windows, among other energy intensive products.

Additionally, a large portion of NEEA's market research is done in a business-to-business environment as well as with consumers. The former focuses on the following types of research subjects:

- Trade professionals, such as electricians, plumbers, maintenance managers, etc.
- Building industry professionals, such as property developers and managers
- Engineers – electrical, structural, mechanical, etc.
- Architects
- Manufacturer reps
- Retail sales managers
- Distributors

Typical market research objectives include, but are not limited to:

- Sizing the market
- Identifying and/or validating assumptions about market readiness
- Mapping the market structure
- Use, attitude and perceptions regarding products
- Understanding the competitive set
- Mapping the decision-making process, influences and leverage points
- Understanding expert opinions
- Trend analysis

## 5. Technical Competence

NEEA will assess vendor qualifications in three technical competency areas listed below. Vendors may submit qualifications in as many areas for which they would like to be considered.

### 1. Research Methodology

This refers to the overall strategy of designing and integrating the different components of a study in a coherent and logical way so that the results will effectively address the research problem; it constitutes the blueprint for the collection, measurement, and analysis of data. The MRE team is interested in understanding each vendor's strengths in primary and secondary research, and in quantitative, qualitative & mixed method research design. Key focus areas include, but are not limited to:

- Qualifications of staff -- Experience, expertise & ongoing training in:
  - Primary and/or secondary research
  - Qualitative methods
  - Quantitative methods
  - Mixed methods
- Use of innovative tools and technologies
  - What are they, and are they in-house or partnership based
  - How do they improve the effectiveness/usefulness of the research
- Development of research instruments

For each of these focus areas NEEA would like to have vendors specify whether or not they have in-house expertise in quantitative, qualitative or both disciplines. If vendors

have regular sub-contracting relationships/practices to leverage qualitative or quantitative expertise, please include those in your submission.

## **2. Sample Design & Recruitment Strategies**

This refers to the approach of identifying and recruiting the research population necessary to effectively address the research problems. Although identification of the right population is critical for success, emphasis for this RFQ should be on recruitment. NEEA would however like to understand your sampling techniques (e.g., simple random sampling or systematic sampling etc.) and corresponding capabilities.

## **3. Data files development, Analysis, Synthesis & Reporting**

This refers to the overall delivery and socialization of research results. The MRE team relies on various market research efforts to answer critical program related questions in a timely manner. A key responsibility is to relay real time findings (that may inform next steps in the design of a research methodology) to team players and ensure that research findings are socialized, understood and utilized appropriately by all team managers.

## **6. Submission Requirements**

Your submission will include three sections:

- 1) Cover Letter;
- 2) A Technical Competence Section of up to 12 pages; and
- 3) Appendices

NEEA encourages you to use the principles outlined in the NEEA Market Research and Evaluation Report Guide document for your submission (available at: <https://neea.org/resources/2017-market-research-and-evaluation-reporting-guidelines>).

The following guidelines should be followed for each of the three sections of your submission.

### **6.1 Cover Letter**

Include a 1 to 2-page overview that describes:

- Specific technical competence areas for which you intend to submit qualifications.
- The organization's history, highlighting experiences and core competencies. Explain why your organization is a good fit with the needs outlined in this RFQ.
- Areas that you believe you are qualified in a way that represents a competitive advantage over other vendors in terms of technical competence (i.e., methodologies; data collection and analysis approaches; market sizing expertise; research and sample design, etc.)
- Finally, please share your approach for maintaining and continually improving your organization's ability to meet the needs of its clients.

- Please provide a summary of your organization’s experience with utilities, energy efficiency and supply chain audiences (i.e., sales reps, distribution & warehousing and manufacturing)<sup>1</sup>.

## 6.2 Technical Competence

Include a document of no more than 12 pages that provides evidence of technical competence as outlined in Section 5 above. To this end, NEEA would like vendors to provide one or two examples of projects that included effective approaches. Summarize the expertise & experience of your staff as it relates to NEEA’s needs, and describe what you have done in any or all of the following areas:

- **Research Methodology.** Describe your company’s competencies in identifying and developing the most appropriate research design given the objectives, budget and time constraints of a particular project.
- **Collection and use of quantitative data.** Describe the overall objective of the project(s) and how your work met the unique project challenges or research objectives. Include any instruments developed for this project(s) in the appendix.
- **Collection and use of qualitative data.** Describe the overall objective of the project(s) and how your work met the unique project challenges or research objectives. Include any instruments developed for this project(s) in the appendix.
- **Recruitment or sampling strategies.** Describe the overall objective of the project(s), the specific challenges associated with recruitment or sampling and how your work met the unique project challenges or research objectives.
- **Deployment of mixed method approaches.** Describe the overall objective of the project(s) and how mixed method data collection met the research objectives. Explain how the research activities were phased and how the different approaches were reconciled and integrated. Any supporting information may be included in the appendix.
- **Approaches to the synthesis of results.** Describe how this approach to research synthesis resulted in better outcomes associated with acceptance and integration of research findings. Summarize the different tools you employed to engage your clients in the synthesis process of findings. How did you incorporate feedback and how do you help clients to “benefit” from learnings? Provide examples of tools if applicable, in the appendix.
- **Techniques used to report and present data.** Describe how this approach to reporting resulted in a compelling and easy to read and reference final report. Summarize the different tools you employed to deliver a summative “story” of the research project. What techniques did you incorporate to provide depth (in analysis of data, description of methods, etc.) without sacrificing breadth (integrating findings

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<sup>1</sup> This information is not necessary for vendors who have qualified as evaluation providers.

across research activities, providing necessary context, etc.) How did you manage the client review process? Provide examples of tools if applicable, in the appendix.

### 6.3 The Appendix

The appendix should have 2 sections:

- 1) Company Information
- 2) Details of Technical Competence

Please use the following guidelines for creating your appendix:

#### Section 1: Company Information

- Up to 10 1-page bios of those who would be most likely to be assigned to the NEEA team based on the type of work we are requesting. Please include the role that each of these individuals would play on any given project (i.e., researcher, project manager, data analyst, etc.) This list is not intended to reflect the only people that may be assigned to a NEEA project, although we would expect that in most cases you would assign either these people or people with similar skills and experience. We will use these bios to gain a better understanding of the depth and breadth of your staff's skills and experience relative to our needs.
- A list of awards and/or formal industry recognition received in the past 3 years
- Organization chart, highlighting who NEEA's key contact(s) should be when initiating a limited RFP. Please also explain how your organization structure enables effective project and account management<sup>2</sup>
- Rate sheets and/or fee schedule for services rendered
- Documentation reflecting your organization's good financial standing, such a Dun & Bradstreet report.

#### Section 2: Details of Technical Competence

- Vendors may include additional documentation or links to tools used in support of examples of your organization's technical competence.

### 7. RFQ Schedule

If you have clarification questions prior to putting together your submission document, please take the following steps:

- Send one email with your intent to submit and any clarifying questions by no later than September 6, 2018.
- NEEA will create one document that answers all questions and send it to all who submitted an intent to submit by September 13, 2018.

Statements of qualification must be submitted to the RFQ Point of Contact listed below in electronic format no later than October 11, 2018.

Responders will be notified by December 17, 2018 if NEEA will include you in the qualified vendor list.

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<sup>2</sup> For those who have already qualified as evaluation providers, the following information is not required: organization chart, rate sheets and/or fee schedule, Dun & Bradstreet report, insurance details.

We intend to update at least some of this information (such as bios, rate sheets, etc..) on an annual basis.

All correspondence, including but not limited to, questions and submissions shall be directed via email to the following RFQ Point of Contact:

Anu Teja  
Senior Project Manager, Market Research & Evaluation  
E-mail: [ateja@neea.org](mailto:ateja@neea.org)  
Northwest Energy Efficiency Alliance  
421 SW 6<sup>th</sup> Avenue, Suite 600  
Portland, OR 97204

## **8. Selection**

### **8.1 Evaluation**

Responders should note that submissions will be evaluated in terms of:

1. Responsiveness to the RFQ requirements.
2. The experience of the firm(s) providing the qualifications.
3. Proven capability to execute similar work for other organizations.
4. The experience and qualifications of the individuals specifically proposed to execute and manage the project.

NEEA is under no obligation to enter into a contract with any qualified respondent, nor is there any obligation or intent implied to reimburse any party for the cost of preparing statement of qualification in response to this RFQ.

### **8.2 Preferred Insurance Coverage**

Vendors interested in working with NEEA should be aware of the following insurance requirements for all NEEA vendors.

Vendors must maintain adequate and reasonable insurance covering their performance under any offered contract, including, but not limited to Commercial General Liability of at least \$1,000,000/occurrence, Business Automobile Liability insurance, and any workers' compensation and unemployment insurance required by law. Professional Liability insurance may also be required. NEEA may request a copy of such insurance policies prior to awarding work.

See sample terms and conditions for additional information about minimum insurance requirements: <https://neea.org/img/documents/sample-neea-contract-terms-and-conditions.pdf>.