



# Request for Qualifications: RFQ # 51211

## NEEA Market Research and Evaluation Team: Open Submission Vendor RFQ for Market Research, Evaluation, and Data Analytics and Cost-Benefit Model Review

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## **1 About the Northwest Energy Efficiency Alliance**

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 natural 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)

### **1.1 Brief Description of NEEA's Market Transformation Programs**

On behalf of the alliance, NEEA designs and implements programs that aim to transform the market around energy efficient products and practices in the Northwest region (Idaho, Montana, Oregon, and Washington). NEEA's market transformation programs invest in a suite of market intervention strategies intended to remove barriers and exploit market opportunities to accelerate the adoption of cost-effective energy efficiency. Examples of interventions that NEEA's programs have carried out in the market include: training installers on new and emerging technologies; engaging with manufacturers to influence product design and hasten commercialization of new higher efficiency models; incentivizing distributors to stock more efficient products and to provide full category sales data to NEEA in order to analyze trends in market share; coordinating with ENERGY STAR® and other energy efficiency labels to influence the labeling criteria, product categories receiving labels, and testing procedures; implementing awareness campaigns to targeted adopters of a technology or practice, and others. Looking back across NEEA's history, examples of the products that have been the focus of NEEA's market transformation programs are lighting products, such as compact fluorescent light bulbs; heat pump water heaters; HVAC technologies, such as ductless heat pumps; home appliances such as heat pump dryers and front loading clothes washers; industrial equipment such as motors, fans, and compressors; and efficient windows. Examples of energy efficient practices that NEEA's programs have addressed include strategic energy management, green motor rewinds, and efficient home building.

## **2 Background on the RFQ**

NEEA's Market Research and Evaluation (MRE) Team seeks to develop a list of pre-qualified vendors (including contractors and consultants) with known skill sets within one, two, or all three of the qualifying categories, or work areas, described in this request for qualifications (RFQ), to help streamline the awarding process for certain MRE projects. The list of pre-qualified vendors will be used to identify and invite vendors to submit proposals for projects within their qualified areas via a "limited RFP process". Only pre-qualified vendors will be eligible to bid on MRE projects bid out through the limited RFP process. The three qualifying work areas are:

1. Evaluation
2. Market Research
3. Data Analytics and Cost-Benefit Model Review

## 2.1 MRE's Use of the Limited RFP Process

NEEA intends to use the qualified pool of vendors established through this RFQ to select vendors for the roughly 20-30 small to medium-sized projects MRE manages each year. The budget range for the types of projects qualified vendors may be invited to submit proposals for varies widely. Small projects, such as data analysis and program cost-benefit model review projects average \$8,000 to \$15,000, while medium-sized projects range from \$15,000 to \$80,000. Annual evaluations for some of NEEA's programs, such as the theory-based evaluations, may have higher budgets. Note that larger research and evaluation projects (with budgets anticipated to exceed \$80,000) will be contracted through an open competitive process via RFPs posted on NEEA's public website<sup>1</sup>.

## 3 Overview of MRE at NEEA and MRE Work Categories

MRE supports NEEA's market transformation programs by managing research and evaluation projects that provide actionable insights to develop and implement market transformation strategies, independently assess and document market progress, and provide a continuous stream of feedback for adaptive management. In general, MRE manages three types of research and evaluation projects for NEEA's program teams: evaluation, market research, and data analytics and cost-benefit model review work.

### 3.1 Evaluation Work

NEEA's program teams use evaluation deliverables to monitor and track program performance in achieving regional market transformation goals. Since NEEA's programs are guided by program theories, which are laid out in detailed logic models, the term "theory-based evaluations" is used to describe the type of evaluations MRE conducts. Instead of considering the impact in terms of units sold, average megawatts saved, or number of individuals served, NEEA's theory-based evaluations consider the extent to which programs are influencing a given market in the way anticipated by the market transformation theory (also referred to as a program theory, or theory of change).

NEEA's evaluations are longitudinal, mixed-method studies that combine results from multiple evaluation activities including: large sample size surveys, interviews, focus groups, observational and ethnographic research, mystery shopping, etc. The results of these evaluations provide supporting evidence that programs are achieving their market transformation goals in the way anticipated by the program theory. Such goals might include accelerating market adoption of more efficient products, increasing the rate of installers' recommendation of a product, increasing the share of regional distributors that stock a product, increasing the number of utilities that are offering incentives for the product, or increasing retailers' awareness of a specific efficiency label for a product.

### 3.2 Market Research

NEEA's program teams use market research deliverables to help identify market barriers to target, opportunities to explore, and knowledge gaps to narrow to advance

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<sup>1</sup> Vendors wishing to submit responses to MRE's open competitively bid RFPs can be notified of upcoming solicitations by subscribing to "NEEA Request for Proposals (RFPs)" at <https://neea.org/subscribe>

program market transformation goals. These studies use the same methods as used to conduct evaluations, but they are not longitudinal and do not usually serve to measure performance against specific logic model outcomes. The objectives of this type of research seek to understand markets, perceptions, use and attitudes of market actors, product feasibility in newly identified markets, supply chain mapping, potential consumer value propositions and ways to effectively message this, etc. Importantly, MRE's market research deliverables establish the foundation for future evaluations by confirming barriers and helping to refine the program theory.

### **3.3 Data Analytics and Cost-Benefit Model Review**

NEEA's Planning Analysts are responsible for building programs' cost-benefit models, which are used as the basis for forecasting and reporting energy savings associated with market progress of programs to NEEA funders. They use MRE's research and evaluation reports to help them review their baselines, validate model assumptions, and conduct the data analysis needed to annually estimate energy savings. MRE has grouped these types of projects in a category referred to as "Data Analytics and Cost-Benefit Model Review." In some places throughout this document, this has been shortened to "modeling support".

### **3.4 Common MRE Research Objectives**

Below are high-level descriptions of research objectives commonly associated with MRE RFPs. While these are broken out by the three work categories addressed in this RFQ, many MRE projects will have multiple research objectives that straddle two or three of the work categories. For instance, an annual program evaluation is likely to also include market research objectives to uncover market insights that will help inform the program theory. This type of information lays the groundwork for future evaluations, which aligns this type of market research objective with the scope of an evaluation. Likewise, RFPs often include scope to review an energy savings forecast model or validate a key energy savings model assumption as part of a larger request to evaluate market progress toward logic model outcomes for a given NEEA program.

#### **3.4.1 Typical Market Research Objectives**

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

- Sizing the market
- Identifying and/or confirming consumer or target market value propositions
- Identifying and/or validating assumptions about market readiness
- Mapping the market structure and supply chains
- Characterizing use, attitudes, and perceptions of products and/or practices by suppliers and/or end-users or consumers
- Understanding the competitive set for a particular product
- Mapping decision-making processes, influences, and leverage points
- Understanding expert opinions, motivations, professional networks, and workplaces in which they operate
- Conducting trend analysis
- Testing hypotheses about the market
- Exploring and validating barriers to adoption and/or market opportunities

### 3.4.2 Typical Evaluation Objectives

Typical evaluation objectives include, but are not limited to:

- Tracking progress towards program-specific Market Progress Indicators (MPIs) through the use of a variety of methods, including:
  - Interviews, surveys, ethnography, and other primary research
  - Analysis of sales and/or shipment data
  - Review of program documents and other literature review activities
  - Focused discussions with NEEA program team members, individually or in groups
- Validating barriers to adoption and other barriers outlined in a program logic model
- Identifying and/or characterizing new opportunities for programs from an array of sources, including: utility program activity, consumer perspectives, market intelligence related to market effects (such as labor constraints, supply shortages, or increased demand), emerging technology, energy efficiency labeling, federal standards, etc.
- Establishing initial market baseline conditions.
- Validating naturally-occurring baseline forecasts that the NEEA Planning Analyst has modeled.

### 3.4.3 Typical Data Analysis and Cost-Benefit Model Review Objectives

Data analysis and model review work generally represents smaller MRE projects in terms of budget, scope, and time. It is occasionally more cost-effective to include these types of study objectives within a larger project for the same product or practice. For example, a large annual evaluation for the Heat Pump Water Heater Program may include a research objective to review the naturally-occurring market share baseline. That is why this example objective is included in the list of typical evaluation objectives provided above, as well as a data analysis and model review objective. Alternatively, for annual model reviews, MRE project managers may choose to issue an RFP for multiple years of the same model review, meaning that the selected vendor may be awarded the same project for several years in a row; a small project on an annual basis, but in aggregate, a sizeable project over time.

Typical data analysis and cost-benefit model review objectives include, but are not limited to:

- Reviewing and verifying results of various market forecasting models, including naturally-occurring baselines.
- Advising on the development of new market forecasting models, particularly with respect to the validity of key inputs and assumptions about the timing and scope of codes and standards updates, shifts in consumer demand, product development timelines, etc.
- Assisting with the calibration of market forecasting models to real world conditions.
- Developing an approach for approximating a metric that we do not have access to or that may be unknown.
- Developing the most appropriate extrapolation method.
- Comparing established sources of information.

- Critiquing reliability of information.
- Reviewing and verifying calculations (methods and/or results) such as cost-effectiveness, market penetration, and unit energy savings.

## **4 Vendor Qualifications and Technical Competency Areas**

Below are the technical competency areas that RFQ response submissions should highlight. All MRE vendors are expected to have experience in the technical competency areas discussed below. These guidelines are not intended to disqualify vendors who do not possess these competencies in-house; vendors are encouraged to submit their response in partnership with other teams that can supplement their skill sets to meet the expectations laid out in this RFQ. Note that if MRE elects to pre-qualify partnered teams and includes them in a future limited RFP short list, then vendors are expected to submit proposals that include the same team.

### **4.1 Research Design**

Please describe your team’s competencies in identifying and developing appropriate research designs given the objectives, data resources, target audiences, budget and time constraints of a particular project. This includes the overall strategy of designing and integrating different components of a study in a coherent and logical way so that the results effectively address research objective(s). Responses should describe a typical workplan, including approach to data collection, measurement, and analysis. Responses should provide specific examples of the team’s strengths in the following areas.

#### **4.1.1 Research Methodology**

Describe your team’s expertise in the design and implementation of research methods, including for qualitative, quantitative, and mixed-method research designs. What research methods, both qualitative and quantitative, does your team have proven success implementing? Provide examples from past projects that showcase your team’s strength in fielding these methods.

MRE is amenable to the use of innovative tools and technologies for our research and evaluation projects. If you have examples of methods you have had success with, outside the traditional methods of surveys, interviews, and focus groups, please describe these methodologies and how you effectively used them to address the project’s research objectives.

#### **4.1.2 Research Instrument Development**

Responses should provide a detailed description of your team’s best practices in developing research instruments, such as survey instruments, structured and semi-structured interview guides, focus group discussion guides, etc. Include any examples of instruments that exemplify your strengths in this area as an appendix.

#### **4.1.3 Sample Design & Recruitment Strategies**

Responses should provide a description of your team’s approach to identifying and recruiting the research population necessary to effectively address research objectives. Although identification of the right population is critical for success, emphasis for responses to this RFQ should be on recruitment. Many of the market actors NEEA typically targets in its studies are drawn from “hard-to-reach” (or hard to identify)



populations, such as professional installers or building maintenance professionals. Vendors should not assume that NEEA will be able to provide sample frames or sample contact information for its studies. Therefore, vendors should describe tested approaches to recruiting in the absence of contact lists. NEEA would also like to understand your sampling methodologies (such as simple random sampling, systematic sampling, or snowball sampling) and corresponding capabilities. Responses should also include details about incentive strategies your company has tested and proven.

***A note on recruiting for NEEA projects:***

Vendors should consider that the majority of NEEA's market research and evaluation is done in a business-to-business environment. To a much lesser extent, our research efforts target consumers (or end-users of a product). This focus on business and trades has some inherent limitations on the development of sample frames and contact lists, and on the productivity of recruitment efforts. MRE is typically unable to provide representative samples for populations targeted for research and evaluation. Vendors are encouraged to address these constraints and highlight experiences they have had in successfully recruiting and conducting research in a business-to-business environment. To the extent that their work plays a role in energy efficiency, the following is a list of professionals and other market actors that MRE's research and evaluation efforts commonly sample:

- Trade professionals, such as electricians, plumbers, maintenance managers
- Building industry professionals, such as property developers, general contractors, building operators, and energy raters
- Engineers – design, electrical, structural, mechanical, etc.
- Architects
- Design professionals
- Specifiers
- Manufacturer reps
- Retail sales managers
- Distributors
- Manufacturers

## **4.2 Data Collection and Analysis**

Please describe the tools and frameworks your team typically uses to collect and analyze data. What software do you use to collect and manage large datasets? What are your best practices in cleaning and conducting quality control? MRE studies often use triangulation to look for trends and draw conclusions across multiple data sources. Data sources might include:

- Quantitative data, such as survey data, shelf-stocking survey data, sales data, or energy performance data.
- Qualitative data from interviews and/or focus groups. Interviews might be with multiple market actor groups and might use different interview guides for each market actor.
- Qualitative data from ethnography or observational methods.
- Secondary sources of information.



- Notes from facilitated discussions with NEEA program teams, utility program managers, or other stakeholders.

Describe your best practices in analyzing both quantitative and qualitative data. MRE studies draw heavily upon qualitative research methods, so NEEA is particularly interested in understanding your approaches to analysis of qualitative data. Responses should provide a detailed description of analytical methods you use, such as content analysis or other frameworks. What are your methods for coding qualitative data? Describe any software your team routinely uses to code and analyze data. Provide examples of projects where you were expected to analyse nuanced qualitative data from multiple sources. What enabled you to be successful? What were some interesting themes you were able to identify as a result of effective analysis?

### 4.3 Synthesis & Reporting

Responses should describe the key strategies for both the synthesis of research results and the delivery of results and key findings. The MRE team relies on multiple phased research and evaluation efforts (carried out under separate contracts over several years) that build upon each other to answer increasingly focused program-related questions over the life of a market transformation program. A key responsibility of our research and evaluation vendors is to relay real-time findings (that may inform the scope and design of the next research or evaluation project) to NEEA program teams, and to ensure that research findings and implications are clearly articulated and understood by each internal program team member.

Responses should describe techniques and frameworks your team regularly employs to identify themes across the results of multiple research activities. What is your approach to the synthesis of these results in informing your conclusions? Provide examples of how your approach to the synthesis of key findings with your clients have resulted in better outcomes associated with the client's acceptance and integration of research findings. Summarize the different tools you employed to engage your clients in the synthesis process. How did you incorporate feedback and how do you help clients to realize the benefit of research and evaluation findings? Provide examples of tools, if applicable, in an appendix.

NEEA commits to its funder partners to conduct regular and rigorous research and evaluations and to publish the reports from these studies on neea.org. As such, MRE maintains high standards for the quality of the reports it receives from vendors. MRE standard procedure is to conduct multiple rounds of review for each deliverable, including final reports, interim memos, and research instruments, until expectations for content, comprehensiveness, clarity, length, display of data, and aesthetics are met. Responses should describe your team's "best in class" approach to reporting. How do your reporting protocols enable you to deliver compelling, easy to read and reference final reports? Summarize the different tools you routinely draw upon to deliver a summative "story" of the research project. What techniques do you incorporate to provide depth (in analysis of data, description of methods, etc.) without sacrificing breadth (integrating findings across research activities, providing necessary context, etc.)? How do you manage the client review process? Provide examples of tools, if applicable, in the appendix.

## 5 RFQ Response Required Content

Your response submission packet will include three sections:

1. Cover Letter;
2. Key Information Section; and
3. Appendices

### 5.1 Cover Letter

Include a 1 to 2-page overview of your submission that describes:

- Which of the qualifying work categories (Evaluation, Market Research, and/or Data Analytics and Cost-Benefit Model Review) you are submitting qualifications for.
- Your organization's history, highlighting experience and core competencies.
- Why your organization is a good fit for the needs outlined in this RFQ.
- Your organization's experience with utilities, energy efficiency, and supply chain audiences (such as installer contractors, code officials, design professionals, distributors, and manufacturers).
- Areas where you believe your qualifications represent a competitive advantage over other vendors in terms of technical competence (for example, methodologies, data collection and analysis approaches, modeling expertise, research and sample design, logic model development and review).

### 5.2 Key Information

Include a section of no more than 12 pages (per work category) that addresses the following components pertaining to technical competencies (as outlined in [Section 4](#)). This section should also include your company's approach to maintaining excellence in project and account management. Summarize the expertise and experience of your staff as it relates to NEEA's needs and describe what you have done in the following areas:

1. **Project Management:** Explain how your organization structure enables best-in-class project management.
2. **Technical Competence:** Provide evidence of your organization's competence in executing tasks within the technical competency area(s) described in [Section 4](#).

Include 2-4 summaries of projects that you have completed in the past six years. The projects highlighted should demonstrate the depth and breadth of your expertise. Each summary might include:

- Background (project justification, objectives, and type of work) and logistics (duration, budget, number of employees/sub-contractors involved, markets, products, etc.)
- Summary of the key methods for design, data collection and analysis
- A few key results, and how those results were acted upon by the client
- For at least one project summary include a description of a major obstacle you overcame, or problem you solved. Describe how you discovered, communicated, and addressed the obstacle or problem.

- A link to the report for at least two completed projects. The report should demonstrate your ability to leverage visualization techniques to communicate ideas; to synthesize key findings into relevant conclusions and/or indicated actions; and to communicate technical information in a style readable by a wide audience. If you are unable to provide a weblink to the report, please include a copy of the report or portions of the report as an appendix.

### 5.3 Appendices

In addition to any example work from previous projects (such as reports, or excerpts of reports, research instruments, or analysis frameworks), the following documentation are required appendices (unless otherwise noted below):

#### 1. Team Resumes

Include a 1-page resume for each key contributor on your team including the role that each of these individuals would play on any given project (project manager, qualitative research lead, data analyst, etc.). This list is not intended to reflect the only people that may be assigned to a NEEA project, although it is expected that in most cases you would assign either these key people or people with similar skills and experiences.

#### 2. Organization Chart

Include your current org chart. Indicate who the 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.

#### 3. Rate Sheet

Please include a current hourly rate sheet and/or a fee schedule.

#### 4. List of Recent NEEA Projects

Provide a complete list of any projects you have conducted for NEEA in the past six years, or that are currently underway. Include the contract number, name of the project, contracted budget amount, and NEEA contract manager.

#### 5. Awards and Industry Recognition (*Optional*)

Provide a list of any awards and/or formal industry recognition your firm has received in the past five years.

#### 6. NEEA Vendor Information Form

Complete and include the NEEA Vendor Information Form (included as [Attachment A](#) to this RFQ) with your qualifications response submission.

## 6 Response Submission Process, Evaluation Criteria, and Other Key Details

### 6.1 RFQ Point of Contact

All correspondence related to this RFQ should be directed via email to MRE\_RFQ@neea.org.

### 6.2 Existing Pre-Qualified Vendor Response Process and Timelines

In 2017 and 2018, NEEA issued two RFQs for market research and for evaluation and planning (NEEA RFQs #50817 and #50510, respectively). This RFQ #51211 builds upon the vendor pool established by these earlier RFQs by augmenting the list with new pre-qualified vendors and updating information and qualifications for existing MRE pre-qualified vendors.

For current pre-qualified MRE vendors (who submitted responses to previous RFQs #50817 and/or #50510) that wish to remain on the MRE vendor short-list, updated information must be provided to NEEA no later than **March 31, 2021**, according to the following process:

1. In the online submission form at <https://neea.org/get-involved/requests-for-proposals-qualifications/mre-rfq-submission>, select the work areas for which your team is currently qualified to signal your intent to maintain your status as a pre-qualified vendor for these work areas.
2. **Current pre-qualified vendors are not required to submit a complete response package**, unless they are seeking to be qualified for a new work category. These vendors only need to provide the updated documentation outlined in Section 5.3 (Appendices). Provide these appendices via the online submission form via a single pdf file. If you intend to submit a response for a new work category, follow the standard process for all new vendors detailed below.

Current pre-qualified vendors who do not provide updated information by March 31, 2021 may be removed from MRE's list of pre-qualified vendors at the discretion of the MRE manager. However, these vendors are still eligible to respond to open competitively bid RFPs posted to neea.org.

### 6.3 New Vendor Response Submission Process and Timeline

**NEEA is accepting vendor qualification response submissions on an ongoing basis through December 31, 2022.**

To be considered, vendors shall select one or more of the qualifying work categories in the online submission form at <https://neea.org/get-involved/requests-for-proposals-qualifications/mre-rfq-submission>. These categories include:

1. Market Research
2. Evaluation
3. Data analytics and Cost-Benefit Model Review

Vendors should upload an electronic copy of their statement of qualifications to NEEA through the online submission form. **Please do not submit multiple files.**

Submissions should be a single file, pdf format, and should include all appendices, as well as [Attachment A](#). For vendors wishing to submit responses to multiple work

categories, include statements of qualifications (as outlined in Section 5.2 above) for each work category in one file. Use subject headings as appropriate.

Qualification submissions will be reviewed by the NEEA MRE Team. A NEEA representative will respond to the key contact provided in the submission within four weeks of the submission date with a decision regarding the inclusion of your firm on our list of pre-qualified vendors, or to request more information from your firm. Should your firm be accepted for inclusion as a pre-qualified vendor, you will be eligible to participate in NEEA's limited RFP process for MRE. However, it should be noted that not all pre-qualified vendors will be included on the short-list for every limited RFP.

NEEA regularly evaluates its pre-qualified vendor list to ensure ongoing alignment with market changes and business needs. Periodic updates to some information may be requested from pre-qualified vendors. NEEA may extend the duration of a vendor's qualified standing at its discretion. NEEA is under no obligation to enter into a contract with any pre-qualified respondent.

#### **6.4 Evaluation Criteria**

Submissions will be evaluated in terms of the following:

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 NEEA projects that might be awarded as a result of this RFQ.

### **7 Preferred Insurance Coverage**

Firms 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 insurance of at least \$1,000,000/occurrence, Business Automobile Liability insurance, and any workers' compensation and unemployment insurance required by law. Professional Liability and Cyber 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>.

**ATTACHMENT A  
NEEA Vendor Information Form**

**Date:** \_\_\_\_\_

**Legal Name of Organization:** \_\_\_\_\_  
(If this is a dba or subsidiary, please provide the name of the parent organization) **dba/abn:** \_\_\_\_\_

**State of Registration and Registration Number (if known):** \_\_\_\_\_

**Local Address:** \_\_\_\_\_

**HQ Address (if different than above):** \_\_\_\_\_

**Website:** \_\_\_\_\_

**Total Number of Employees in Organization:** \_\_\_\_\_

**Total Annual Gross Revenues:**

- |                         |                          |                           |                          |
|-------------------------|--------------------------|---------------------------|--------------------------|
| Under \$100,000         | <input type="checkbox"/> | \$1,000,000 - \$5,000,000 | <input type="checkbox"/> |
| \$100,000 - \$500,000   | <input type="checkbox"/> | \$5,000,000 +             | <input type="checkbox"/> |
| \$500,000 - \$1,000,000 | <input type="checkbox"/> |                           |                          |

**Is this organization Disadvantaged Business Enterprise (DBE) certified?**  Yes  No

List any certifications and the state the certifications are in:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Does this organization utilize sustainable business practices?**  Yes  No

Please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_