

Market Research & Evaluation

Request for Proposals:

RFP #52761

Connected Consumer Products Market Research



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1 Introduction

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 985,000 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

2 Background

NEEA's Retail Product Portfolio (RPP) Program seeks to influence manufacturers of consumer products, such as refrigerators, clothes washers and dryers, and televisions, to build energy efficiency into their product design by:

- Identifying and supporting emerging technologies that can advance efficiency.
- Increasing demand from retailers and consumers by providing mid-stream incentives to retailers for sales of qualifying efficient products. This activity aims to influence retail assortment and product promotion and obtain access to full-category sales data for incented products.
- Influencing ENERGY STAR® specifications, guiding development of or revisions to federal and state standards, and informing test procedures for products in the RPP portfolio.

As residential consumer appliance technologies continue to evolve and more connected products are available to consumers, the RPP team is interested in better understanding consumers' perceptions of and interest in connected products.

ENERGY STAR defines connected products as those that "provide energy reporting, consumer amenity, and grid services through connection to other systems inside and outside the home."¹

This research will inform the RPP team's strategy around retailer and manufacturer engagement as well as involvement in ENERGY STAR specification, state and federal standard, and test procedure development and update processes.

3 Research Objectives

NEEA is soliciting proposals from qualified vendors to meet the following research objectives regarding consumers' use of, understanding of, and attitudes toward connected consumer products. NEEA is interested in learning about refrigerators, freezers, clothes washers, clothes dryers, room air conditioners, room air cleaners, and televisions with connected capabilities.

¹ https://www.energystar.gov/products/spec/connected_criteria_energy_star_products_pd

- 1) In order to better understand consumer willingness to purchase connected consumer products and engage with utility programs developed for connected products, assess current levels of consumer awareness of, understanding of, and interest in using connected consumer products.
- 2) In order to better understand consumer acceptance of connected products, assess the experiences of consumers who are already using connected consumer products, including how consumers are connecting to and engaging with connected capabilities and what benefits and challenges they report.
- 3) In order to understand predictors of consumer interest in and uptake of connected consumer products, explore what characteristics, if any, differentiate consumers with varying perspectives on using connected devices in their homes. If possible, provide profiles of consumers with varying levels of interest in engaging with connected consumer products.

4 Parameters/Considerations

4.1 Sample Population

NEEA is interested in two populations:

- 1) Residential consumers who already own at least one connected consumer product, and
- 2) A sample of all Northwest residential consumers.

Both samples should be stratified by state. Bidders should also propose any other strata they believe will be necessary to capture a breadth of consumer perspectives (for example, age and income level).

4.2 Research Design (Approach and Methodology)

NEEA requests that bidders begin by reviewing existing literature/research and then focus areas for primary research to fill in the gaps. NEEA is not interested in duplicating existing research/body of knowledge. NEEA requests that bidders provide a high-level summary of the types of literature they will review, including any syndicated research sources or reports.

For primary research with consumers, NEEA is open to both qualitative and quantitative methodologies, including surveys, interviews, focus groups, and message boards, as well as other data collection methodologies. NEEA is also open to a broad range of analytical tools that bidders could use to address the research questions.

NEEA's Market Research and Evaluation (MRE) team aligns itself with the American Evaluation Association's [Guiding Principles for Evaluators](#), including (a) Systematic Inquiry, (b) Competence, (c) Integrity, (d) Respect for People, and (e) Common Good and Equity. These principles collectively represent a "north star" toward which the NEEA MRE team is oriented in the selection of study methodologies, identification of inquiry questions and objectives, development of sampling frames and techniques, and engagement with market actors and members of the public.

NEEA encourages bidders to review the Guiding Principles and highlight the ways in which their proposed study design and activities align with and support these principles.

4.3 Deliverables

4.3.1 Kickoff Meeting and Work Plan

The selected contractor will plan and set the agenda for a kickoff meeting to discuss project administration and expectations, research plans, and rough timelines.

Prior to the kickoff meeting, the selected contractor will submit a draft work plan to the NEEA Market Research and Evaluation (MRE) Scientist. The work plan will describe data collection, analysis, and other proposed activities, deliverables, and timelines.

Within one week of the date of the kickoff meeting, the selected contractor will submit a final work plan that incorporates any feedback received in writing and/or during the kickoff meeting.

4.3.2 Sample Lists, Data Collection Protocols, and Instruments

The selected contractor will draft, revise, and submit a final version of all sample lists and survey/data collection instruments, including protocols for collection of existing data. Drafts will be submitted to NEEA's MRE Scientist for review and final approval.

Bidders' timelines should allow for review of recruitment language and sample lists by NEEA and stakeholders as appropriate.

Bidders should consider the use of financial or non-financial incentives to encourage participation. The selected contractor will be expected to train any project staff that will be responsible for recruitment and scheduling.

Documentation of procedures for recruitment and sample management will be completed by the selected contractor.

4.3.3 Post-Literature Review Memo and Synthesis Session

Once the literature review portion of the research has been completed, the selected contractor will provide the NEEA MRE Scientist with a written memo summarizing key findings and conduct a synthesis session with NEEA staff to align on key research priorities for the consumer market research portion.

4.3.4 Final Reports, Presentation & Cleaned Contact Lists

The selected contractor will provide a final report summarizing the findings of both the literature review and the primary research with consumers.

When the final stage of the research is nearing completion, the selected contractor will meet with the MRE Scientist to discuss the report outlines and approach for providing a findings presentation to NEEA staff.

The selected contractor will create a draft report that synthesize findings for each of the research objectives, submit the draft report to NEEA for review and comment, then incorporate comments and submit the final report.

NEEA may request more than one round of review on all or portions of the reports depending on the degree to which the initial draft meets the program's needs. Please specify how many rounds you are including within the proposed budget. The report will follow NEEA's [Style Guide for Public Research Reports](#).

For the presentation, the contractor will provide the MRE Scientist with draft slides and incorporate feedback on the slides in the final findings presentation.

4.4 Budget & Timeline

Proposals should be provided on a time and materials basis. Bidders should provide a competitive budget estimate that is sufficient to cover their proposed work. NEEA believes a reasonable budget for this work is \$120,000.

Bidders should submit proposal with what work can be done within this budget. Bidders are also welcome to submit optional tasks with those optional add-on costs provided separately.

NEEA's MRE Scientist will work with the selected contractor to negotiate the specifics of the proposed research activities to meet resource constraints. Proposal estimates should reflect that the selected contractor is responsible and accountable for the following:

- All logistics associated with executing the research tasks, including travel for any in-person data collection
- Preparing identified deliverables
- All subcontractors used on this project
- Contractors' allocation of resources to tasks
- Invoicing and expense reporting per contract terms
- Distribution and tracking of incentives for research participants

NEEA expects this work to kick off in late March/early April 2024 and wrap up by the end of 2024. An extension into 2025 is possible if needed.

5 Proposal Requirements

5.1 Proposal Format (Proposals that do not follow requirements will not be considered or scored)

5.1.1 Executive Summary of Research Design

Include the key strategies and approach to completion of the scope of the work; proposed costs; and the specific reasons NEEA should select your team.

5.1.2 Tasks and Deliverables

Provide a detailed description of the specific methodologies and approach to be undertaken to complete the scope.

Be sure to include project management activities in proposed implementation strategy as well.

Identify all major phases and milestones for the project and the associated deliverables.

5.1.3 Project Timeline & Cost Estimate

Provide the proposed timeline for all major phases and milestones of the project broken out by proposed task and associated deliverables.

Include the cost estimate for each task. Be sure to separate the optional “add-ons” outside of the work proposed within the anticipated budget.

A breakout of any direct costs and an hourly rate sheet for the project period may be included here or in the Proposal Appendix section.

5.1.4 Proposal Appendix

- Hourly Rate Sheet - for all proposed project team members with estimated hours by task (required if time & materials)
- Company background & qualifications
- Project Team & Team Bios – Include information about program team members and team structure, past team efforts on similar work, years of experience and other relevant qualifications.
- Examples of case studies

6 Proposal Submission

Bidder shall submit (1) electronic copy of the proposal by 5:00pm PST on the day listed in the RFP schedule below.

6.1 RFP Schedule

March 4, 2024	Intent to bid submission due by 5:00pm PST
March 4, 2024	Email questions for clarification by 5:00pm PST
March 6, 2024	Answers to questions e-mailed back by 5:00pm PST
March 20, 2024	Proposals due by 5:00pm PST
April 1, 2024	Anticipated contract award date
April 22, 2024	Anticipated work/contract start date

6.2 RFP Point of Contact

All correspondence, included but not limited to, questions and submissions shall be directed to Meghan Bean, Senior Market Research & Evaluation Scientist (mbean@neea.org).

6.3 Intent to Respond

All “Intent to Respond” forms (see Appendix A) must be received by 5:00pm PST on the day listed in the RFP Schedule.

Only those parties submitting the “Intent to Respond” form by the due date deadline will be provided with updates to the RFP, have questions responded to and have their proposals considered.

7 Selection

Bidding firms will be rated among others in terms of the overall responsiveness to the RFP – how well all RFP requests have been addressed including, but not limited to:

- 1) Demonstrated understanding project objectives, nuances, and potential roadblocks to meeting objectives
- 2) The thoughtfulness and appropriateness of the proposed design used to accomplish the desired results of the project
- 3) Thoughtfulness and appropriateness of respondent recruitment approach and ability to address potential issues
- 4) How well deliverable examples and descriptions meet the stated needs and intended use
- 5) Overall value for expenditure
- 6) Evidence of innovation/creativity in both overall design, recruitment, and deliverables
- 7) Evidence of flexibility throughout the project lifecycle
- 8) Ability to communicate complex ideas/concepts in a clear and succinct manner
- 9) The balance of the complexity of design with the succinctness of communication of the design

In addition, the following factors will play a key role in the selection process:

- 1) The experience and qualifications of the individuals specifically proposed to execute and manage the project.
- 2) The experience of the firm or team of firms making the proposal.
- 3) The capability to execute the plan, including past experience and aptitude for collaboration.

Bidder’s disadvantaged business enterprise (DBE) state certifications are also a factor NEEA considers during the proposal evaluation process. Bidders are encouraged to provide information regarding any DBE state certifications they hold in the Intent to Respond Form (see Appendix A).

Proposals may be evaluated by the NEEA Project Manager and other NEEA staff that we believe have the perspective needed to make this important decision. NEEA is under no obligation to provide work to any vendors responding to this solicitation, nor is there any obligation or intent implied to reimburse any party for the cost of preparing a proposal in response to this RFP.

8 Insurance Requirements

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, Professional Liability Insurance of at least \$1,000,000/combined single limit, Business Automobile Liability insurance, and any workers' compensation and unemployment insurance required by law.

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>.

Appendix A - Intent to Respond Form

RFP #: 52761

Project Title: Connected Consumer Products Market Research
NEEA Point of Contact: Meghan Bean (mbean@neea.org)

PLEASE PRINT:

Company	
Address	
City, State, Zip	
Contact Name	
Contact Title	
Phone #	
E-mail	

The company named above intends to submit a proposal in response to NEEA's request for proposal listed above. Deadline for submitting the "Intent to Respond" form is end of business day of date listed in the RFP schedule.

List any Disadvantaged Business Enterprise (DBE) certifications and the state of the certifications below:
