

Request for Proposals- RFP #53137- High-Performance HVAC Program Implementation Support



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1 Background

1.1 About the Northwest Energy Efficiency Alliance

The **Northwest Energy Efficiency Alliance, Inc. (“NEEA”)** is an alliance of more than 140 utilities and energy efficiency organizations working on behalf of over 14.5 million energy consumers across the four Northwest states.

Since 1996, NEEA has taken a market-driven approach to energy efficiency that is grounded in data, collaboration, and rigorous evaluation. NEEA works to transform markets by filling information gaps and identifying and removing barriers so that the market can align around evolving electric and natural gas energy efficiency needs. For more information, visit neea.org.

1.2 Acronyms, Definitions, and Applicable Documents

Acronym / Term	Definition
VHE DOAS	Very High Efficiency Dedicated Outdoor Air System
ERV	Energy Recovery Ventilator
HRV	Heat Recovery Ventilator
NEEA’s Utility Funders (the “Utilities”)	Northwest Region Utilities funding NEEA to achieve energy savings targets in 5-year cycles
Manufacturers	Producers of water heating technologies, including but not limited to HPWHs, standard electric water heaters, split system water heaters, etc.
Awardee	The Finalist chosen by NEEA to enter into pre-contract negotiations to complete the project outlined in this RFP in a future potential via a potential future contract with NEEA
Bidder	Any individual or firm who submits an application or Proposal to be considered for this RFP
Finalist	Any Bidder’s Proposal that NEEA determines will be considered for the award of a potential future NEEA contract as a result of this RFP. Not all Bidders will be selected as a Finalist, and more than one Finalist may be selected.
NEEA	Northwest Energy Efficiency Alliance
Northwest Region	Includes Idaho, Montana, Oregon, and Washington
RFP	Request for Proposal
Proposal	Bidder’s submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP.

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Applicable Resources & Documents:

- [BetterBricks VHE DOAS program page](#)
- [VHE DOAS Equipment & Design Best Practices](#)
- [VHE DOAS Field Site Re-Evaluation](#)

1.3 Background and Description of the Program

The High-Performance HVAC program (herein referenced to as the “Program”) aims to transform the commercial HVAC market in Idaho, Montana, Oregon, and Washington (the “Northwest Region”) toward adoption of [very high efficiency dedicated outside air systems \(“VHE DOAS”\)](#). While DOAS is not a new concept, a very high efficiency approach to DOAS pairs a high efficiency heat/energy recovery ventilator (“HRV/ERV”) with high efficiency heat pump, while following key design principles.

This combination of equipment and design enables optimized system performance and allows for many benefits, including:

- Demonstrated HVAC energy use reduction by an average of 69% over conventional systems (48% of building energy);
- Improved indoor air quality (“IAQ”) and thermal comfort; and,
- Proven adaptability to changing occupant densities, ventilation requirements, and resiliency in extreme weather events.

1.4 System Overview

The VHE DOAS approach is comprised of four (4) key elements, listed below and depicted in Figure 1. While there are varying levels of “good,” “better,” and “best” practices associated with each of these individually, addressing them all and applying design “best” practices on a project-by-project basis enables maximum performance and the substantial energy savings, as illustrated in [NEEA’s demonstration projects](#), and as follows:

1. **High efficiency HRV/ERV** with $\geq 82\%$ Sensible Recovery Effectiveness¹ (“SRE”) that enables a fully decoupled approach while delivering tempered air with little-to-no post-heating or cooling in many Northwest Region climates and applications.
2. **High performance electric heat pump system** that meets or exceeds current ENERGY STAR minimum efficiency requirements².
3. **Fully decoupled ventilation** that delivers outdoor air directly to the indoor spaces to allow the primary heating and cooling system to cycle-off when space conditions allow; this approach also ensures that ventilation air is effectively distributed to all spaces, regardless of the operation of the primary heating and cooling system.
4. **Right-sized heating and cooling equipment** supported by peak load analysis that considers the HRV/ERV’s reduction of ventilation load and includes reasonable assumptions and safety factors.

¹ HRV/ERV must also meet a minimum total fan efficacy of 1.3 cfm/Watt at 0.5% w.g. external static pressure at 75% of rated air flow and have variable speed supply and exhaust fans to be a compliant product.

² For equipment where ENERGY STAR does not apply, minimum efficiency requirements are included in NEEA’s [“Equipment and Design Best Practices for Optimal Efficiency”](#) summary document (NEEA 2022).

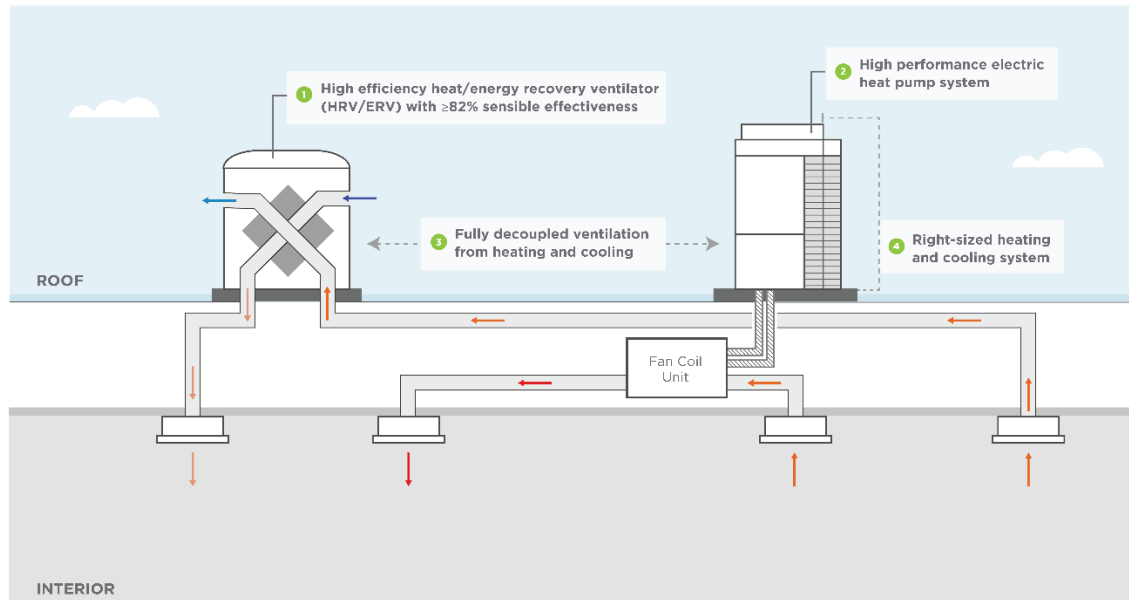


Figure 1. VHE DOAS diagram with key elements (©2022 Copyright NEEA).

NEEA's High-Performance HVAC Program ramped up market activities in 2022 to generate the momentum needed to drive the broad adoption of this VHE DOAS approach through the following strategies:

1. Building supply chain awareness and capability, especially in HVAC designers and manufacturer representatives who influence equipment selection and design.
2. Defraying the incremental cost of very high efficiency HRV/ERVs with potential incentives and promotions between NEEA, utility partners, and manufacturers.
3. Leveraging air quality, comfort, sustainability, and net operating income benefits of the system approach in value proposition communications for owners and their design teams.
4. Supporting inclusion of system equipment and design elements in developing local, state, and national codes and standards.

1.5 Current Market Barriers & Opportunities for Program Intervention

Key barriers to achieving VHE DOAS include:

- A commercial HVAC industry (designers and supply chain) that's relationship-based and deeply entrenched in their way of approaching design and business practices.
- Complexity of promoting an entire system approach vs. a focus on individual equipment components.
- Higher upfront cost to design and install a new system (compared to a 1:1 replacement).
- Lack of awareness for VHE DOAS—and, at times, skepticism about whether it will reliably perform.

1.6 Accomplishments

Since its inception in 2015, the Program has achieved some key accomplishments, as follows:

- Helped bring the first very high efficiency HRV to the US market in 2015 to enable vetting of this system approach.

- Conducted extensive market research, including a [market characterization](#), [specifier interviews](#) and [focus groups](#), and [end-user decision-making](#) that informed priority leverage points, helped defined and refine target audiences, and determined key messaging and value propositions.
- Provided data to support inclusion of DOAS in the 2015 Washington State Energy Code (“WSEC”) as well as informing additional efficiency credits for high-performance HVAC path (406.7) in 2017 WSEC, enabling incremental progress toward this very high efficiency system approach.
- Completed fourteen (14) demonstration projects, including energy metering, participant surveys, technical reports, and case studies.
- Developed wide range of [Program resources and technical content](#) used to educate the market on the benefits of VHE DOAS, including a [focus on decoupling ventilation and heating & cooling systems](#), [comparison of VHE DOAS & WSEC DOAS requirements](#), [the value of right sizing HVAC systems in a VHE DOAS design](#), and a [podcast episode highlighting the potential for VHE DOAS in Washington State](#).
- Delivered Program information to key market actors via 80+ industry events and presentations, through a combination of direct market engagement and collaboration with manufacturer representatives.
- Conducted several phases of technical analysis to refine the product definition, culminating in a [report](#) on energy use and cost analysis that included over 5,000 permutations of VHE DOAS configurations. This analysis informed updates to the product definition made in early 2022 which NEEA funders subsequently leveraged to investigate measure development.
- As of June 2025, expanded the number of manufacturers with compliant HRV/ERVs from one (1) to nine (9) and grew the complaint product list from five to over 170 compliant models.

1.7 Target Audiences

The Program aims to engage two (2) groups of market actors with the highest propensity for designing, selling and/or installing a high-performance ventilation and/or HVAC system (collectively referred to herein as the “Target Audiences”).

The Primary Target Audience, the focus of this RFP, includes the following (collectively referenced to herein as the “Primary Audience”):

- Mechanical engineers, manufacturers, manufacturer representatives, and/or those designing and specifying commercial HVAC systems;
- Architects;
- End-users, including building owners, property managers, building operators, etc.; and,
- Energy Service Companies (“ESCO”s).

The Secondary Target Audience includes the following (collectively referenced to herein as the “Secondary Audience”) (proposed strategies can optionally address this audience):

- Northwest Regional and/or national industry organizations operating in a similar capacity to NEEA.

RFP Note: Reach should extend to the Northwest Region; however, outreach efforts are not required to be equally allocated across each state in the Northwest Region.

At a minimum, Proposals should address the following:

- Which organizations/associations Bidders would prioritize for targeted audiences.
- What existing relationships Bidders can leverage for this work in the Region.
- How Bidders would propose prioritizing the Primary and Secondary Audiences, market, and/or channel.
- How Bidder's approach would balance maximizing Program reach while achieving system adoption within the allocated budget.

NEEA has done substantial market research to identify potential channels through which to engage with the Primary and Secondary target audiences; this information will be provided to the Awardee.

2 Approach and Methodology

NEEA values a collaborative environment and encourages bidders to incorporate their proven and creative experiences from other related work into their approach. NEEA is interested in approaches which utilize market intelligence and segmentation to inform Program design and implementation.

NEEA encourages Bidders to explore partnerships which would enhance the strength of their approaches, i.e., bring specialized capabilities such as market engagement, technical, data analysis, and other skills to each area of work. Much of the requested work performed by the Awardee will require collaboration with NEEA staff, NEEA engaged third parties, and additional market actors.

NEEA's Market Transformation efforts rely on development of strong relationships to support lasting change. Bidders should demonstrate capacity to approach the work in a way that supports strong relationship development and value over the long term. This includes the sensitive and secure handling of confidential information and data. Bidders should utilize a holistic view of the market to inform Bidders' proposed implementation approach, including how the market is expected to evolve in the next three (3) to five (5) years.

3 Objectives

This Section describes the objectives of the Work to be contracted as a result of this RFP, following completion of this RFP process, in accordance with Section 6.1- RFP Schedule.

3.1 Program Objectives

The Program's objectives include:

- a. General Program Implementation and Technical Support.
- b. Market Engagement Strategy and Implementation.
- c. Incentive Processing and Product Support and Refinement.
- d. Support Increased Focus on Hydronic Heating & Cooling Systems.

3.1.1 Objective A: General Program Implementation and Technical Support

Provide support to Program by managing existing knowledge & resources; monitoring market for potential collaboration opportunities; developing guidance for customers choosing between various NEEA commercial HVAC program opportunities; and providing technical guidance and ad hoc support.

3.1.2 Objective B: Market Engagement Strategy and Implementation

Develop and manage the implementation of a Market Engagement Plan in support of Program objectives including, but not limited to:

- Engaging key market actors and decision makers involved in the specification of commercial HVAC systems, with the goal of education and recruitment to participate in VHE DOAS Activities.
- Demonstrating the full range of benefits associated with VHE DOAS (i.e. efficiency, comfort, alignment with future building standards and codes, total asset value, etc.).
- Supporting marketing team in development of educational and awareness-building content.
- Matching communication and engagement strategies to each Targeted Audience type (owner, maintenance & facilities staff, specifiers & designers, etc.).
- Delivering trainings and presentations with support from NEEA's marketing team.

3.1.3 Objective C: Incentive Processing and Product Support and Refinement

Provide ongoing support of the VHE DOAS incentive application process, confirming Program compliance and eligibility. Maintain Program compliant products list and system requirements, provide ongoing technical support.

3.1.4 Objective D: Support Increased Focus on Hydronic Heating & Cooling Systems

Provide technical and strategic guidance in support of the Program's goal to increase representation of VHE DOAS projects utilizing hydronic heating & cooling systems.

4 Bidder Qualifications

NEEA encourages individual Proposals from all Bidders with relevant experience, as well as Proposals from teams of experienced contractors. The following qualifications are preferred, however, Bidders with equivalent experience in a related field are also encouraged to respond:

1. Demonstrated strong knowledge of the commercial HVAC market, especially experience working with building trades and distribution channel.
2. Understanding of how to apply Market Transformation principles to the commercial HVAC market, including identifying barriers to the adoption of energy-efficient design practices, potential leverage points, influencers, and market trends.
3. Subject-matter expertise and strong strategic capabilities in commercial HVAC product design, specification and selection process.
4. Technical expertise to enhance market adherence to product or design elements of commercial HVAC.
5. Experience developing and managing a comprehensive market engagement strategy with a focus on commercial HVAC designers, specifiers, building operators and owners.
6. Strong relationship management skills to develop and support strategic market partner engagement across the supply chain, both regionally and nationally.
7. Demonstrated experience and/or capacity to work and collaborate with other individual contractors or teams.
8. Excellent written and verbal communication skills, producing consistently professional Deliverables.
9. Demonstrated technical and operational capabilities to meet NEEA data management requirements, including the sensitive handling and analysis of confidential market data.
10. Experience launching products into new or existing market segments.
11. Experience working with ESCOs.

5 Scope of Work

5.1 Objective A: General Program Implementation and Technical Support

5.1.1 Activities:

1. Support NEEA Staff in Program activities associated with implementation and refinement of the VHE DOAS incentive strategy and overall Program implementation.
2. Assist in sharing new learnings to maintain alignment with NEEA Staff and NEEA engaged entities, as well as onboarding NEEA engaged entities to expand Program activities and market reach.
3. Gather market intelligence and technical analysis from interactions with market actors to help identify and develop tools/resources/materials to bolster the value proposition for VHE DOAS and inform Program evolution.
4. Develop strategy for guiding customers through decision-making process of matching NEEA-recommended commercial HVAC solution to their specific project.
5. Actively monitor for opportunities to collaborate with regional and national industry organizations.
6. Provide ad hoc technical guidance in support of Program objectives.
7. Participate in one to two American Society of Heating, Refrigeration, and Air-conditioning Engineers (“ASHRAE”) technical committees and/or subcommittees in support of Program codes & standards strategy.

5.1.2 Deliverables:

1. Emails, memos, meeting notes, slide decks, and/or additional documents to support incentive application refinement and processing for VHE DOAS, as requested by NEEA.
2. Detailed annual work plan and Budget, as approved by NEEA Program Manager.
3. Monthly Progress Report in Word or similar format which includes a detailed summary of any Work in process and/or completed related to ongoing technical support Activities, including high-level description and budget associated, due the fifth day of each month (e.g. October 5, 2025; November 5, 2025; December 5, 2025; etc.) through the Term.
4. Monthly Program Activity Report in Word or similar format to include a monthly summary for all Activities performed to include, but not limited to, the following Activities:
 - a. ASHRAE technical committee Activity summary;
 - b. Target Audience engagement summary;
 - c. Key Program Activities (as further outlined in Section 5.1.1- Activities);
 - d. Key learning and insights into the market and progress toward work plan objectives; and
 - e. Budget and financial reporting, due the fifth day of each month through the Term (see Section 5.1.2(3)).
5. Monthly financial forecast by Task, broken out for each month of the current year and each quarter for subsequent years, with explanations for forecast-to-actual variances of more than 5% at Task level.

5.2 Objective B: Market Engagement Strategy and Implementation

The market engagement plan will support the Program team in achieving its goal of increasing awareness, understanding, and favorability of VHE DOAS with Target Audiences by participating in at least the following Activities:

1. Proposing Activities and participating in efforts that raise supply chain and end-user awareness of the system approach and its significant cost savings and non-energy benefits.
2. Educating and motivating early adopter HVAC designers to design and sell this system approach.
3. Supporting the development of awareness and educational resources by providing industry intel, recommending the most useful resources for the intended audience, drafting technical content, and reviewing draft deliverables before publication.
4. Identifying and reporting on key findings and recommendations for continual Program improvement.

The Program team is looking for Bidders to propose their approach to and experience with each of these key strategies and for each target audience.

RFP Note: The Program has a breadth of existing information, presentations, and tools and is specifically looking for Bidders with industry relationships and experience to get this information into the hands of early adopters. Bidders may propose additional strategies not listed above that they believe could help the Program in achieving its desired goals.

5.2.1 Activities

1. Develop and implement a market engagement plan targeting key commercial HVAC design influencers and decision makers, including but not limited to:
 - a. Manufacturers & manufacturer representatives;
 - b. Architects, engineers & specifiers;
 - c. Building owners; and
 - d. Building operators and maintenance staff.
2. In collaboration with NEEA, identify key market engagement roles and opportunities for support from NEEA staff, Bidder team members, and market actors, including:
 - a. Marketing team;
 - b. Manufacturer and manufacturer representatives account managers;
 - c. Industry partners;
 - d. Product manager;
 - e. Regional network of design & construction professionals; and
 - f. Licensed engineer(s).
3. Support NEEA's marketing team in development of educational and awareness-building content.
4. Engage Target Audience actors, as identified in the market engagement plan, and as agreed upon with NEEA. Activities shall include, but are not limited to:
 - a. Identifying and recruiting market actors to participate in Program Activities (case studies, events, trainings, etc.).
 - b. Delivering trainings and presentations in support of VHE DOAS Program objectives.

5.2.2 Deliverables

1. Draft and Final versions of 2026 market engagement plan.
2. Draft year-end summary report of 2026 outreach support activities and accomplishments in Word format to NEEA.
3. Final memo highlighting conversations, Deliverables, and any Activities that contribute to validation of NEEA-provided market progress metrics, due to NEEA.
4. Maintain market engagement calendar tracking trainings and events, including attendees, content and post-event outcomes as requested by NEEA and through the Term.

5. Deliver four (4) NEEA-agreed upon presentations and/or trainings in 2026 to Target Audiences, as requested by NEEA throughout the Term.
6. Recruit minimum six (6) designers and/or owners of commercial buildings utilizing VHE DOAS systems to participate in various Program Activities, including but not limited to:
 - a. Case studies;
 - b. Building tours;
 - c. Interviews; and,
 - d. Testimonials.
7. Deliver notes from bi-weekly and additional meetings in Word or similar format within two (2) business days of each meeting throughout the Term.

5.3 Objective C: Incentive Processing and Product Support and Refinement

5.3.1 Activities

1. Provide technical review on early-stage and submitted incentive project applications.
2. Coordinate with manufacturer representatives and design engineers to gather necessary information, as further specified by NEEA.
3. Where applicable, work with NEEA Staff to coordinate with the Utilities on potential custom utility incentives.
4. Provide ad hoc technical assistance to inform incentive strategy application and processing.
5. Facilitate NEEA outreach with key manufacturers, as identified with NEEA.
6. Support NEEA efforts to maintain and update VHE DOAS system requirements documentation, including managing Compliant HRV/ERV list.
7. Provide technical support to the NEEA team related to manufacturer, other collaborators, and/or additional ad hoc technical requests that enhance adherence to product or design elements of VHE DOAS.
8. Support NEEA's tracking of market progress as it relates to manufacturer and manufacturer representative engagement.
9. Update sub-folder stored on NEEA systems with application, supporting materials, and relevant emails, per application received.

5.3.2 Deliverables

1. Summary of applications reviewed and/or processed, and support provided in Word or similar format, included in the monthly Progress Report throughout the Term.
2. Summarize real-time notes from outreach Activities and communications with manufacturers and manufacturer representatives for each key interaction, throughout the Term.
3. Vet and review HRV/ERV products in consideration for addition to compliance product list as requested by NEEA throughout the Term.
4. Update compliant HRV/ERV Product List due to NEEA one (1) week after end of each calendar quarter of the Term.
5. Complete and detailed record of Activities and notes from real-time manufacturer outreach, generated for each key interaction in a phone call or meeting as requested by NEEA throughout the Term.
6. Emails, memos, meeting notes, slide decks, and/or other documents to support incentive application, processing and/or HRV/ERV vetting procedures as requested by NEEA throughout the Term.

5.4 Objective D: Support Increased Focus on Hydronic Heating & Cooling Systems

5.4.1 Activities

1. Provide strategic guidance, design, and coordination in support of the Program’s goal to increase representation of hydronic heating & cooling systems, including:
 - a. Identify gaps in Program-developed technical resources and/or resources conflicting with hydronic system specifications.
 - b. Propose adjustments to manufacturer and manufacturer representative engagement.
 - c. With the assistance of Program engineering, data, and market research team members, establish parameters for ideal VHE DOAS hydronic project prototype, including building size & function, customer type, and local climate considerations.

5.4.2 Deliverables

1. Comprehensive report summarizing gaps in current program resources and Activities with regards to engaging audience focused on hydronic heating and cooling in commercial buildings.
2. Action plan describing steps for expanding VHE DOAS activities in the hydronic market, including estimated resource plan and anticipated outcomes.
3. Notes from bi-weekly and additional meetings via email within two (2) business days of each meeting throughout the Term.

5.5 Timeline

NEEA anticipates an award date of September 15, 2025, with work to conclude by December 31, 2026 (“Term”).

5.6 Budget

NEEA estimates the Budget for the Activities to be between **\$20,000-\$30,000 in Quarter 4 of 2025** and **\$155,000-\$175,000 in 2026**, but will consider all well-written Proposals that present thoughtful and cost-effective strategies. If necessary, NEEA will work with Bidders to negotiate the specifics of their proposed Budget to meet resource constraints.

6 Proposal Submission

Bidder shall submit one (1) electronic copy of the Proposal by the end of business day listed in the RFP Schedule below. NEEA may alter or adjust the RFP Schedule in its sole discretion.

6.1 RFP Schedule

Bidders’ Intent to Respond Form Deadline (optional): July 11, 2025 (5 PM PST)

Bidders’ Question Submission Deadline via email (see Section 6.2): July 16, 2025

NEEA Questions answered via email: July 23, 2025

Bidders’ Proposals due: August 18, 2025

NEEA’s Selection of Finalists Deadline: August 27, 2025

Finalists’ Presentations Deadline: September 3-4, 2025

NEEA’s Anticipated Notification of Awardee Deadline: September 15, 2025

All Bidders’ correspondence including, but not limited to, questions and submissions shall be directed to:

NEEA Employee Name: Dave Hammond

NEEA Employee Title: Senior Program Manager, Products

NEEA Employee E-mail: dhammond@neea.org

6.2 Intent to Respond

NEEA encourages Bidders with questions to submit the “Intent to Respond” form (see Appendix A) so it can provide them with updates to the RFP and respond to their questions directly. However, NEEA will consider all Proposals, even those from Bidders who have not submitted an Intent to Respond form.

7 Selection Criteria & Insurance Requirements

7.1 Scoring of Proposals

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. Responsiveness to the RFP and demonstrated understanding of the issues surrounding the project.
2. The thoughtfulness and appropriateness of the proposed methodology used to accomplish the desired results of the project.
3. The experience and qualifications of the individuals specifically proposed to execute and manage the project.
4. The experience of the firm or team of firms making the Proposal.
5. The capability to execute the plan, including past experience and aptitude for collaboration.
6. Overall value for expenditure.

Pursuant to 2 CFR 200.321, NEEA considers qualifying businesses during its RFP solicitation and Bidders’ proposal evaluation process.

Bidders’ proposals may be evaluated by the NEEA project manager and other NEEA Staff that NEEA believes have the perspective and knowledge needed to make this important decision. NEEA treat all Proposals as confidential.

NEEA is under no obligation to provide contracted work to any Bidders responding to this RFP, nor is there any obligation or intent implied to reimburse any Bidder for the cost of preparing a proposal in response to this RFP. Moreover, Bidders have no right or expectation to obtain contracted future work absent a subsequent written contract agreed to by NEEA and the contracted party.

7.2 Insurance Requirements

Note: future contractors engaged to work with NEEA must maintain adequate and reasonable insurance for their performance as independent contractors and should be aware of the following policy requirements:

- 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;
- Any workers’ compensation and unemployment insurance required by law; and,
- Cyber Liability insurance may also be required.

NEEA’s insurance requirements are compulsory unless otherwise determined by NEEA, in its sole discretion. NEEA may request documentation evidencing such coverage in a form determined

sufficient by NEEA prior to awarding work under any subsequent contract with any selected final Bidder.

7.3 Cyber Assessment

By submitting a proposal, Bidder understands and consents to NEEA's use of a third party for background checks regarding business health and cyber security. To facilitate this process, Bidder should include its full legal name and state of formation in the Intent to Respond Form and will cooperate with NEEA's cybersecurity assessment as required. NEEA estimates this process will be completed within one week after a Bidder is selected as a Finalist.

Appendix A - Intent to Respond Form

RFP #: 53173

Project Title: High Performance HVAC Program Implementation Support
NEEA Point of Contact: Dave Hammond, Senior Program Manager- Products
(dhammond@neea.org)

PLEASE PRINT:

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

Please ensure the address listed represents the Company's state of incorporation and/or principal place of business.

The Company named above intends to submit a proposal in response to this RFP. The deadline for submitting the "Intent to Respond" form is 5 PM PST of the date listed in the "RFP Schedule."