

Market Research & Evaluation- Request for Proposals- RFP # 53195- Extended Motor Products ("XMP") Market Progress Evaluation Report ("MPER") No. 2



Table of Contents

1	Background.....	2
1.1	About the Northwest Energy Efficiency Alliance	2
1.2	Acronyms and Definitions.....	2
1.3	About this Request for Proposals.....	2
1.4	About NEEA's Extended Motor Products Program	2
2	Objectives	5
2.1	Program/Initiative Objectives.....	5
2.2	Research Objectives	5
2.3	Applicable Documents	5
3	Parameters/Considerations.....	6
3.1	Sample Population.....	7
3.2	Research Design (Approach and Methodology).....	7
4	Scope of Work	7
4.1	Deliverables.....	8
4.2	Timeline	8
4.3	Budget	8
5	Proposal Submission.....	8
5.1	RFP Schedule	9
5.2	RFP Point of Contact.....	9
5.3	Intent to Respond.....	9
6	Proposal Format.....	9
6.1	Proposal Appendix Items.....	10
6.2	Executive Summary of Research Design (1-page maximum)	10
6.3	Introduction and Project Team Identification (2-page maximum).....	10
6.4	Approach and Methodology, incl. Tasks and Deliverables (10-page maximum).....	10
6.5	Project Timeline & Cost Estimate (2-page maximum).....	11
6.6	Optional Appendices:	11
7	Proposal Submission and Insurance Requirements.....	11
7.1	Scoring of Proposals.....	11
7.2	Insurance Requirements	12
	Appendix A: Intent to Respond Form	13
	Appendix B: XMP Program Logic Model.....	14
	Appendix C: RO1 MPIs and Additional Research Elements	15

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 Northwest Region.

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 and Definitions

The following acronyms, definitions, and terms provide relevant information for Bidders:

Term	Definition
NEEA	Northwest Energy Efficiency Alliance, Inc.
Northwest Region/Region/Regional	Includes the States of Idaho, Montana, Oregon, and Washington.
Bidder	Any individual or firm submitting a 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.
Awardee	The Finalist chosen by NEEA, and/or the Selection Committee, to enter into pre-contract negotiations to complete the work and Study outlined in this RFP in a future potential via a contract with NEEA.
Proposal	Bidder’s submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP.

1.3 About this Request for Proposals

This RFP seeks to solicit proposals for the second MPER for NEEA’s XMP Program (the “XMP Program”). The XMP Program’s primary purpose is to identify and describe evidence that its interventions are reducing market barriers and driving market changes, thereby driving market adoption of highly efficient clean-water pumps and circulators in the commercial and industrial sectors in the manner predicted by the XMP Logic Model (*Appendix B* attached hereto). Additionally, the second MPER includes a secondary focus on formative evaluation of market attitudes toward the Hydraulic Institute’s Energy Rating Label (“HI ER”).

1.4 About NEEA’s XMP Program

The XMP Program aims to accelerate the adoption of energy efficient commercial and industrial pumps and circulators by mitigating or eliminating identified market barriers to adoption of such

technologies. XMP is a Market Transformation (“MT”) initiative designed to bring about extensive and sustained changes in how the pump supply chain produces, sells, markets, and buys clean water pumps and circulators. The XMP Program engages with manufacturers, the trade association, Hydraulic Institute¹, regulators involved in codes and standards, manufacturers’ representative firms, utilities, and pump end-users to raise awareness of and to increase sales of highly efficient pumps and circulators.

Significant federal standards activity for clean water pumps and circulators has created new efficiency metrics, lab test procedures, and minimum requirements. The pump industry now labels products with Energy Rating (“ER”)² labels designed to facilitate easy comparisons of relative efficiency levels across pump models and brands, creating a mechanism for product differentiation for efficient pumps.

NEEA is currently engaging with ten (10) manufacturers’ representative firms (“Participating Firms”) which sell clean-water pumping products in Idaho, Montana, Oregon, and Washington (the “Northwest Region”). NEEA works closely with Participating Firms to identify ways to increase their sales of highly efficient pumps and circulators, with a special focus on smart pumps and smart circulators (which are integrated systems in which the pump or circulator, motor, drive, and controls are built together at the factory). XMP Program funding is used to motivate Participating Firms to implement strategies that will increase the portion of their sales comprised of smart pumps, smart circulators, and other highly efficient pump solutions.

Participating Firms share full-category pump sales data with NEEA on a monthly basis, and NEEA produces detailed monthly reports based on their data, reviewed with each Participating firm in a monthly virtual meeting. Because each Participating Firm is unique and focuses on specific products and market segments, XMP Program strategies are tailored to the specific sales history, product mix, and opportunity set available within each manufacturer representative’s business. NEEA does not require that the incentives, bonuses, and additional support earned by Participating Firms be passed through to the end user of the pump or circulator, although Participating Firms may choose to do so.

Through the XMP Program, NEEA offers four (4) performance-based funding streams that Participating Firms can earn, as follows:

- **Per-Unit Incentives:** NEEA provides Participating Firms with per-unit incentives for sales of pumps and circulators that reach a certain efficiency level. Efficiency is measured using the HI ER database³, and energy savings values are based on the Efficient Pumps⁴ and Circulators⁵ measure sets created by the Northwest Power and Conservation Council. Manufacturer representatives currently can earn per-unit incentives for constant load pumps with an ER of 9+,

¹ <https://www.pumps.org/>

² <https://www.pumps.org/what-we-do/energy-rating/>

³ https://www.pumps.org/EnergyEfficiency/Energy_Rating.aspx

⁴ <https://rtf.nwccouncil.org/measure/efficient-pumps>

⁵ <https://rtf.nwccouncil.org/measure/circulator-pumps>

variable speed pumps and Smart Pumps⁶ with an ER of 52+, and for Electronically Commutated Motor (“ECM”) circulators sold with qualifying controls.

- **Performance Bonuses:** NEEA provides annual and, in some cases, monthly bonuses to reward significant changes in sales mix, with multiple bonus tiers in place to reward increasing levels of success.
- **Program Support Funding:** NEEA requests program support plan proposals from Participating Firms each Fall, and awards co-funding toward specific marketing, sales, inventory, and training activities they will complete in the coming year. Funded activities are intended to promote and raise awareness of the benefits of efficient products among pump users. Progress toward program support plan activities are tracked in each monthly call with Participating Firms, and NEEA occasionally provides technical support or collaborates directly on specific projects, events, or activities.
- **Data Stipends:** NEEA provides a small data stipend to Participating Firms that covers the administrative costs of gathering and submitting monthly sales data via NEEA’s secure data portal. Participating Firms earn a stipend quarterly if they make three on-time monthly data submissions.

XMP Market Barriers, Opportunities, and Program Goals

The XMP Program seeks to reduce market barriers around product awareness and acceptance of the value proposition for high efficiency pumps and circulators. The XMP Program is a MT program focused on bringing about durable, sustained changes in how market actors produce, specify, buy, and sell pumps and circulators.

Prior research conducted by NEEA has identified the following key market barriers contributing to selection of less-efficient pumps and circulators:

1. Specifiers, buyers, and influencers lack awareness and understanding of smart pumps and circulators, and have concerns about smart pumps and circulators’ reliability, performance, down-time, and ongoing maintenance costs.
2. Specifiers and buyers underestimate the importance of and, consequently, do not prioritize smart pumps and circulators.
3. Installation contractors and facility owners prefer like-for-like replacement, as it is easier and limits re-piping.
4. Suppliers and buyers are reluctant to select smart pumps due to first cost and other critical factors (e.g., market inertia, buying habits, staff preferences, bottom-line accounting) take priority over maximizing efficiency.

Additionally, the following opportunities have been identified as potential leverage points to support long-term MT:

1. Leverage HI label and Department of Energy (“DOE”)/Regional Technical Forum (“RTF”) rulemaking and build awareness, acceptance, and use of the ER label as a differentiator through key strategic activities, including:
 - a. A standardized energy rating label;

⁶ Smart pumps are packaged systems with an integrated pump, motor, drive and controls.
RFP # 53195-XMP MPER No. 2

- b. Specification, test lab, and accreditation; and,
 - c. Deemed savings and/or verifiable savings.
2. Advance codes and standards through manufacturer/representative/trade group engagement by building regional demand for product that meets advanced performance tier.

NEEA's Market Progress Evaluation Approach

As noted, the XMP Logic Model describes initiative outcomes—changes in the market from Program activities—and market barriers, opportunities, XMP Program activities, and outputs. Outcomes may be short-term (occurring during the first three (3) Program years), medium-term (occurring from three to five years), or long-term (from five to ten years).

To systematically identify and track evidence over time that: (1) the XMP Program's Activities are resulting in the expected market outcomes, and (2) the outcomes are driving increased adoption of highly efficient clean-water pumps and circulators, NEEA developed Market Progress Indicators ("MPI"s). As shown in the XMP Logic Model (see *Appendix B* attached hereto), almost every XMP Program outcome has a numbered MPI associated with it. *Appendix C- "ROI MPIs and Additional Research Elements"* (attached hereto) provides a detailed table listing each outcome and describing the MPI for tracking that outcome. Note: Appendix C only reflects the specific MPIs that will be tracked as part of MPER No. 2. The full list of MPIs will be provided to the Awardee but is also available to all Bidders, upon request.

2 Objectives

NEEA engages third-party evaluation firms to conduct regular MPERs to inform strategy and enable teams to measure progress toward the outcomes documented in their logic models. MPER Scopes are tailored to meet an individual program team's needs at the time the research is conducted. The second MPER for the XMP Program is intended to build on the findings of the completed XMP MPER No. 1, supporting the XMP Program's adaptive management and refinement of market interventions, and continue tracking of the program's MPIs (the "Study").

2.1 Program Initiative Objectives

The high-level objectives of the XMP Program are intended to build on existing opportunities and reduce or eliminate the identified market barriers outlined in Section 1.3, as follows:

1. Motivate Participating Firms to preferentially stock and increase sales of highly efficient pumps and circulators.
2. Raise awareness of energy efficient pumps, the ER label, and the specific benefits of smart pumps related to installation and maintenance costs.
3. Leverage and expand relationships with pump manufacturers, distributors, and industry associations to benefit long-term MT and to accelerate the pace of smart pump and variable-load pump sales growth.
4. Influence the advancement of new and existing federal standards by demonstrating significant sales growth of smart pumps and smart circulators in the Northwest Region.
5. Monitor progress in the market, collaborate with market actors to understand efficiency opportunities and product developments, and offer technical engineering support.

2.2 Research Objectives

The two research objectives ("ROs") for this work are as follows:

RFP # 53195-XMP MPER No. 2

RO1: Building on the results of XMP MPER No. 1, conduct the second cycle of tracking MPIs (i.e., the 19 MPIs associated with Outcomes I–VII (see *Appendix C* for specific MPI verbiage)), and report progress on near-term outcomes.

RO2: Conduct formative evaluation of market actor perceptions and attitudes regarding the HI ER label, especially as pertaining to trust and perceived relevance.

In keeping with NEEA’s 2022 study on awareness and use of the ER Label, the results of the XMP MPER No. 1 suggest low uptake of the Label among relevant market actor groups, although there is some evidence of greater-than-anticipated awareness among pump end users.

To further explore these dynamics and support ongoing strategic refinement by XMP Program staff, the Awardee will conduct Activities to address the following evaluation questions:

- In what ways, and for what reasons, are pump and circulator end users gaining awareness of the ER Label?
- To what extent, and for what reasons, do midstream market actors trust or distrust the ER Label?
- To what extent and for what reasons do midstream market actors consider the ER label to be relevant or irrelevant to their work?

To support efficient allocation of Study funds, Bidders are encouraged to propose study designs that permit the assessment of the RO2’s evaluation questions alongside RO1’s program MPI tracking without unnecessary duplication of data collection efforts (e.g., leveraging a single survey of pump specifiers to address both RO2 and MPI tracking associated with Outcome II).

2.3 Applicable Documents

To ensure a thorough and accurate assessment of market progress, Bidders should anticipate and allocate time and Budget early in the Study timeline for a review of existing documentation, including, but not limited to, published market research and evaluation reports, internal XMP Program reports, and technical and programmatic memos.

Publicly available examples of such documentation and materials are as follows:

- [2025 NEEA Operations Plan](#) (see page 52 for XMP)
- [Extended Motor Products Market Characterization](#)
- [Extended Motor Products Pump and Circulator Manufacturers’ Representative Pilot: Market Test Assessment](#)
- [Extended Motor Products Regional Market Share Study Report](#)
- [Pump Energy Rating Label Awareness and Use Study Report](#)
- [Extended Motor Products MPER #1](#)

These documents and materials—along with any other relevant resources published or otherwise made available in the period between this RFP’s release and awarding of a contract—should be incorporated into the overall study design to contextualize the XMP Program within the Northwest

Region's market and as potential sources of evidence of market conditions and/or program influence. NEEA encourages Bidders to include this review as a study activity prior to and/or concurrent with the first stages of primary data collection activities. While NEEA welcomes thoughtful and focused incorporation of prior learnings to guide proposed study designs and activities, Bidders are not expected to conduct a comprehensive review during the preparation of their proposals.

3 Parameters/Considerations

3.1 Sample Population

In order to satisfactorily address the Research Objectives stated in Section 2.2, Bidder's Proposal should include sampling plans and recruitment strategies encompassing, at a minimum, the following subpopulations:

- NEEA XMP Program staff
- XMP Program implementation personnel
- XMP Program participants (pump and circulator manufacturer representatives)
- Nonparticipating pump and circulator manufacturer representatives
- Specifying engineers
- Contractors active in the clean-water pump and/or circulator market
- Commercial and/or industrial clean-water pump and circulator end users

In light of the persistent and increasing challenges NEEA has observed in securing an adequate response rate for market actor data collection efforts, Bidders are strongly encouraged to include and ensure adequate budgetary allocations for innovative recruitment methods to support proposed study activities. Examples of such methods include but are not necessarily limited to in-person recruitment at relevant conferences and professional events, snowball sampling from established contacts, and/or collaboration with trade organizations. NEEA wishes to emphasize the significant difficulties that have been observed across multiple studies seeking insights from midstream market actors and technology end users—these dynamics are likely to necessitate extraordinary efforts by the Awardee to secure adequate response rates.

3.2 Research Design (Approach and Methodology)

Bidders are strongly encouraged to review the information published in XMP MPER No. 1 (linked in Section 2.3) in order to familiarize themselves with the recruitment strategies, target sample sizes, and data collection methods employed to assess each MPI. Given the longitudinal nature of MPI tracking, NEEA prioritizes methodological consistency across MPERs to the greatest extent appropriate; in cases where Bidders wish to propose alternative approaches to MPI tracking, such Proposals should be accompanied by a sound rationale for this divergence.

Potential recruitment resources are shown for each MPI listed in *Appendix C* attached hereto. NEEA will work closely with the Awardee to support recruitment efforts, including coordination with NEEA's utility partners to facilitate obtaining permissions and seeking access to utility trade ally contact lists for recruitment purposes. Bidders may propose other sources and/or approaches to obtaining contact lists such as recruiting firms, purchasing lists, etc.

RFP # 53195-XMP MPER No. 2

4 Scope of Work

4.1 Deliverables

At a minimum, NEEA expects completion of the Deliverables, as listed below, for this Study. Bidders may propose Deliverables beyond those outlined here, provided that they are clearly supportive of the Study objectives stated above.

- Draft and finalized versions of work plans.
- A kick-off meeting with NEEA, including draft and final agenda and slides.
- Two (2) working sessions with NEEA at logical intervals, including draft and final agenda and slides for each session. The Awardee will work collaboratively with the NEEA's MRE Scientist to plan an agenda and facilitation approach for each session that fosters team engagement and socialization of results.
- Draft and final market actor sample lists; final sample lists should be cleaned and include both current contact information and any notes generated during recruitment.
- Draft and final data collection instruments (e.g., survey questionnaires and interview guides).
- Draft and final reports. The Awardee will submit a report outline that serves as a basis for discussion between the Awardee, the NEEA MRE Scientist, and other NEEA stakeholders. Based on review and input generated in response to the report outline, the Awardee will produce the draft final report and present it to the NEEA MRE Scientist for review and comment. This draft will be reviewed and commented on by NEEA. Based on these comments, the Awardee shall make revisions and deliver to NEEA a final version of the report. Proposals should plan and budget for multiple iterations with NEEA to achieve an acceptable final report.

Please refer to NEEA's recently updated Style Guide for Public Research Reports⁷ for additional guidelines regarding formatting, structure, and content of this XMP Report.

Bidders may include additional Deliverables in their Proposals, provided any such Deliverables are clearly tied to Study objectives, as outlined in Section 2.2-Research Objectives herein, and related Activities.

4.2 Timeline

NEEA anticipates approximately ten (10) months to complete the Study, from an estimated launch date in August 2025, to the satisfactory completion of all final Deliverables in June 2026. Bidders are encouraged to propose a reasonable timeline that enables them to achieve the ROs as outlined in Section 2.2 above.

///

4.3 Budget

NEEA estimates the Budget for the Study to be between **\$170,000 and \$180,000**, 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.

⁷ <https://neea.org/img/documents/NEEA-Style-Guide-for-Public-Research-Reports.pdf>
RFP # 53195-XMP MPER No. 2

Proposal cost estimates should be provided on a Time and Materials basis and should reflect that the Bidder is responsible and accountable for the following:

- All logistics associated with executing the Study's tasks, including, but not limited to, review of XMP Program materials and published reports, sample development, participant recruitment, and report preparation.
- Preparing and delivering all Study Deliverables.
- Managing and providing itemized expense reporting for all subcontractors used on the Study.
- Contractors' allocation of resources to each Task.
- Invoicing and expense reporting.
- Payment of any honorariums/incentives for Study participation.

5 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 discretion.

5.1 RFP Schedule

- **Intent to Respond submission due:** July 3, 2025
- **Email questions for clarification due:** July 3, 2025
- **Answers to questions emailed back to all Bidders:** July 11, 2025
- **Proposals due:** August 8, 2025
- **Selection of Finalists:** August 15, 2025
- **Anticipated award date:** September 1, 2025

5.2 RFP Point of Contact

All correspondence, included but not limited to, questions and submissions shall be directed to:

- **NEEA Employee Name:** Chris Cardiel
- **NEEA Employee Title:** Senior Market Research and Evaluation Scientist
- **NEEA Employee E-mail:** ccardiel@neea.org

5.3 Intent to Respond

All "Intent to Respond" forms (see *Appendix A* attached hereto) must be received no later than by the end of business day listed in the RFP Schedule.

NEEA encourages Bidders to submit the "Intent to Respond" form 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.

6 Proposal Format

- **Executive Summary** – Include the key strategies and approach to completion of the Scope of the Work; proposed costs; and the reasons NEEA should select your Team.
- **Approach to Project (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.

- **Project Timeline & Cost Estimate** - Provide the proposed timeline for all major phases and milestones of the Study broken out by proposed Task and associated Deliverables. Include the cost estimate for each Task. A breakout of any direct costs and an hourly rate sheet for the Study period may be included here or in the Proposal's Appendix section.

6.1 Proposal Appendix Items

All Proposals should have the following Appendix items:

- **Hourly Rate Sheet** – Required for all proposed Study team members with estimated hours by Task.
- **Company Background & Qualifications** – Include information about your firm's mission, key activities, and readiness to undertake the proposed Study.
- **Study Team & Team Bios** – Include information about the proposed Study team members and team structure, past team efforts on similar work, years of experience, and other relevant qualifications.
- **Examples of Relevant Past Work** – You may provide links to reports or include a summary of current and/or prior project(s) that demonstrate your capabilities as they relate to this work.

6.2 Executive Summary of Research Design (1-page maximum)

Describe the reasons NEEA should select your team. Include your key strategies and general approach to meeting the ROs for XMP MPER No. 2. State the proposed Budget and timeline.

6.3 Introduction and Study Team Identification (2-page maximum)

State your understanding of the Scope and key objectives of the Study, and provide information regarding the proposed Study team, including project management personnel, plan for oversight of field work as appropriate, and specific skills, experiences, and qualifications supporting alignment with this study. Project team bios and/or résumés should be included in the Proposal's Appendix section.

(Note that Bidders that have previously submitted team qualifications and associated materials through NEEA's [MRE Request for Qualifications process](#) may disregard this component of the Proposal; please contact the RFP Point of Contact listed below for confirmation of materials on file.)

6.4 Approach and Methodology, including Tasks and Deliverables (10-page maximum)

Provide a detailed description of the specific methodologies and approach to be undertaken to complete the Scope which is no longer than ten (10) pages. Include Study management Activities in the proposed implementation strategy as well. Please include a detailed description of your strategies for creating sample frames and conducting research. What recruitment sources or lists will you rely on to develop the sample? How much time will you schedule for recruiting? Identify all major phases and milestones for the Project and the associated Deliverables.

Additionally, 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. 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.

6.5 Study Timeline & Cost Estimate (2-page maximum)

Provide your proposed Study timeline in table format. Provide a separate budget table for all major phases and milestones of the Project, broken out by Task. Please include the hourly rate and estimated number of hours for each project team member in the Budget table.

6.6 Optional Appendices:

- **Appendix 1: Updated Study Team Member Resumes:** If your Study team will include any contributors for which NEEA does not have a current resume on file, please include a copy of their resume in the Appendix section.
- **Appendix 2: List of Relevant Projects:** You may provide links to reports or include a summary of an ongoing or previously completed project that demonstrate your capabilities as they relate to this Work.

7 Proposal Submission and Insurance Requirements

7.1 Scoring of Proposals

Bidders 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 limited RFP and demonstrated understanding of the ROs.
2. The thoughtfulness and appropriateness of the proposed methodology to accomplish the desired objectives of the Project.
3. The experience and qualifications of the Project team.
4. 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

Contractors interested in working 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 Finalist.

7.3 Cybersecurity 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 (1) week after a Bidder is selected as a Finalist.

Appendix A - Intent to Respond Form

RFP #: 53195

Project Title: XMP MPER NO. 2

NEEA Point of Contact: Chris Cardiel (ccardiel@neea.org)

PLEASE PRINT:

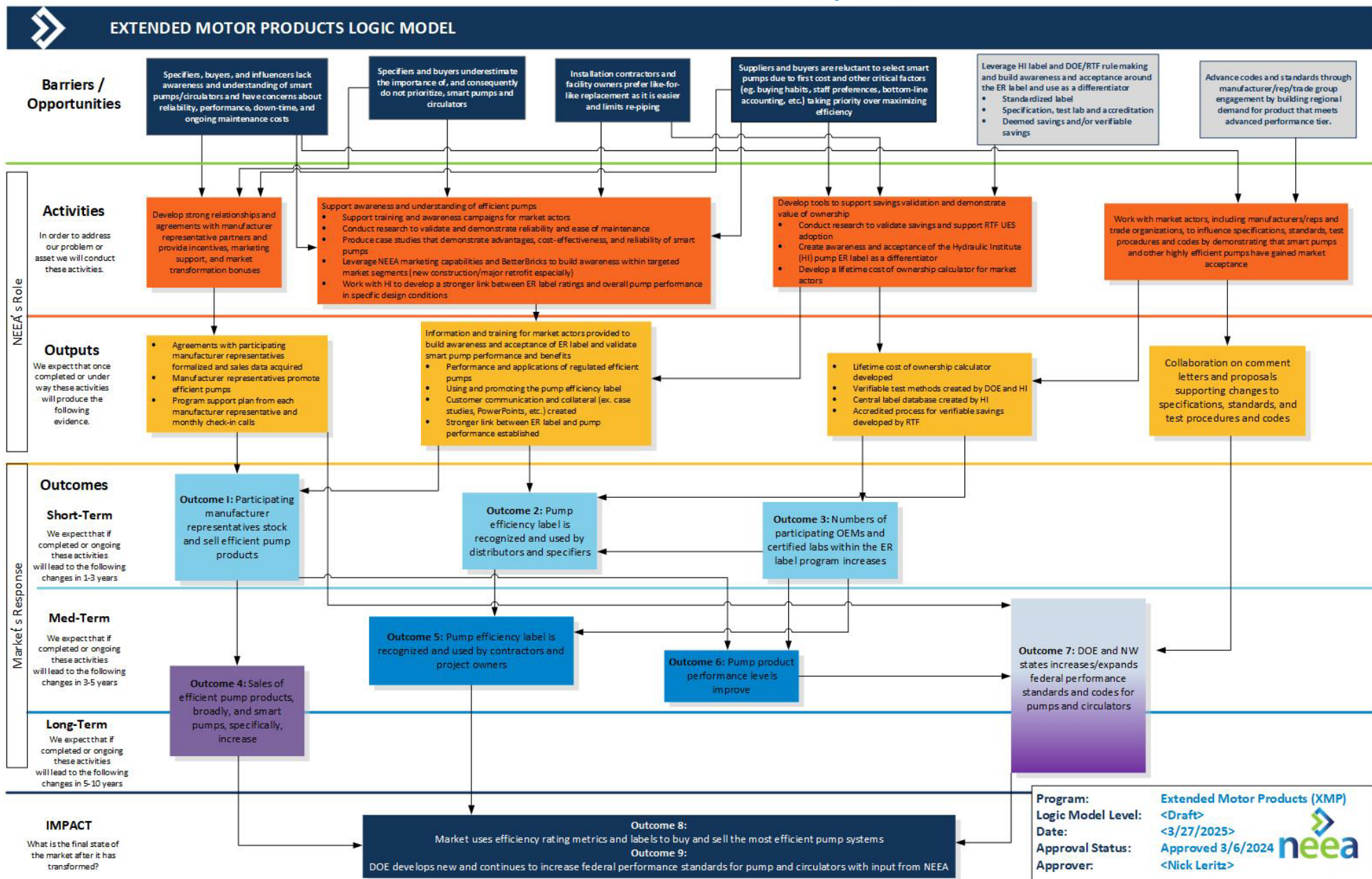
Company	
Address	
City, State, Zip	
Contact Name	
Contact Title	
Phone #	
E-mail	

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 5:00 PM PST of the date listed in the "RFP Schedule."

List any relevant certifications below:

Appendix B: XMP Program Logic Model



Appendix C: RO1 MPIs and Additional Research Elements

XMP Program Outcome	Associated XMP Program MPI(s)	Potential Data and Respondent Resources
Outcome I (short term) Participating manufacturer representatives stock and sell efficient pump products	<ul style="list-style-type: none"> Proportion of incented efficient commercial pumps and circulators relative to non-efficient units sold by participating manufacturers' representatives/distributors increases or does not decrease year-over-year (YOY) 	<ul style="list-style-type: none"> NEEA to provide access to 2021–2025 XMP participant full-category sales data NEEA to provide XMP participant contact information for sample development
Outcome II (short term) Pump efficiency label is recognized and used by distributors and specifiers	Among (1) distributors and (2) specifiers), <ul style="list-style-type: none"> Awareness of the ER label increases YOY Self-reported use of the ER label increases YOY 	<ul style="list-style-type: none"> NEEA to provide XMP participant contact information for sample development Contractor and NEEA will work together to identify additional specifier contacts Contractor may use budget to purchase specifier contact lists
Outcome III (short term) Numbers of participating OEMs and certified labs within the ER Label program increases	<ul style="list-style-type: none"> Number of participating OEMs increases YOY Number of certified labs increases year-over-year YOY 	<ul style="list-style-type: none"> With NEEA's support, Contractor to identify and review relevant trade association databases With NEEA's support, Contractor to identify and review relevant Qualified Product Lists (QPLs)
Outcome IV (medium to long term) Sales of efficient pump products, broadly, and smart pumps, specifically, increase	<ul style="list-style-type: none"> Market share of efficient commercial pumps and circulators increases or does not decrease YOY Market share of commercial smart pumps increases or does not decrease YOY 	<ul style="list-style-type: none"> NEEA to provide access to 2021–2025 XMP participant full-category sales data NEEA to provide access to 2019–2024 XMP Program Annual Reports NEEA to provide list of regionally active clean-water pump and circulator manufacturers' representatives for sample development Contractor may use budget to purchase additional relevant contact lists
Outcome V (medium term) Pump efficiency label is recognized and used by contractors and project owners	Among (1) contractors and (2) project owners: <ul style="list-style-type: none"> Awareness of the ER label increases YOY Self-reported use of the ER label increases YOY 	<ul style="list-style-type: none"> NEEA to provide existing (incomplete) contractor contact lists for survey sample development NEEA and Contractor to collaborate on recruitment efforts to existing project owner contact lists Contractor may use budget to purchase additional contact lists
Outcome VI (medium term) Pump product performance levels improve	<ul style="list-style-type: none"> Average rated efficiency of commercial pumps and circulators sold increases YOY (market-wide and by manufacturer) 	<ul style="list-style-type: none"> NEEA to provide access to 2021–2023 XMP participant full-category sales data NEEA to provide access to 2019–2024 XMP Program Annual Reports

	<ul style="list-style-type: none"> • Sales-weighted average efficiency of products sold increases year-over-year (market-wide and by manufacturer) 	
Outcome VII (medium to long term) DOE and NW states increase/expand federal performance standards and codes for pumps and circulators	<ul style="list-style-type: none"> • NEEA codes and standards team provides documentation to DOE to support increase of federal performance standards and building energy codes • Federal performance standards increase • Relevant building energy codes increase • NEEA role in increased standards and building energy codes documented by third party evaluator 	<ul style="list-style-type: none"> • NEEA to provide relevant program data (e.g., anonymized data submitted to DOE in support of standards and building codes) • NEEA to direct Contractor to documented third-party evaluations of NEEA and partner influence on building codes and federal performance standards for pumps • With NEEA's support, Contractor to identify and review relevany DOE rule-making documents • Contractor to gather qualitative evidence through interviews with NEEA staff, partners, and stakeholders