

# Request for Proposal (“RFP”)

RFP # 53232

## 2027 Residential Building Stock Assessment (RBSA)



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## 1 Introduction

### 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 Idaho, Montana, Oregon, and Washington (“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](http://neea.org).

### 1.2 Acronyms

AMI	Advanced Metering Infrastructure
BPA	Bonneville Power Administration
CSV	Comma-Separated Values
EER	Energy Efficiency Representative
EUI	Energy Use Intensity
NCES	National Center for Education Statistics
NWPCC	Northwest Power & Conservation Council
RBSA	Residential Building Stock Assessment
RFP	Request for Proposals
RTF	Regional Technical Forum
SOW	Scope of Work

### 1.3 Definitions

The following definitions and terms provide relevant information for Bidders:

Term	Definition
Awardee	The Finalist chosen by NEEA to enter pre-contract negotiations to complete the work and Study outlined in this RFP, with the intent of establishing a future contract.
Bidder	Any individual or firm submitting a Proposal to be considered for this RFP.
Direct Funder	A utility or public benefits administrator that directly funds NEEA. NEEA’s fifteen (15) Direct Funders include:  Avista Utilities, Bonneville Power Administration, Cascade Natural Gas Corporation, Chelan Public Utility District, Clark Public Utilities, Energy Trust of Oregon, Idaho Power Company, NW Natural, NorthWestern Energy, Pacific Power, Public Utility District No. 1 of Benton County, Puget Sound Energy, Seattle City Light, Snohomish Public Utility District, and Tacoma Power.
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.
Funder	Utilities that support NEEA’s energy efficiency work by providing five-year funding increments and setting programmatic goals.

Indirect Funder	A utility customer of BPA who is neither a direct funder to NEEA nor an investor-owned utility that funds NEEA through the Energy Trust of Oregon.
Manufactured Home	Residential housing units built in accordance with the 1976 Housing and Urban Development (HUD) mobile home building codes, or mobile homes built prior to the HUD codes going into effect. These include modular homes, factory-built homes, and permanent mobile homes built on an individual lot or in parks.
Montana	The geographic extent defined by the utility territories of NorthWestern Energy and the Western Montana public utilities served by the BPA.
Multi-Family	Residential buildings with five (5) or more units and as further specified: Garden/low-rise: 1-3 stories Mid-rise: 4-6 stories High-rise: 7+ stories
Northwest Region	The geographic areas covering Idaho, Montana, Oregon, and Washington. See Figure 1 for a map depicting this area.
Oversample	A segment of the housing population that is sampled at a higher frequency to meet confidence and precision goals.
Program Manager	The individual at NEEA responsible for implementing the 2027 RBSA and managing the 2027 RBSA Work Group.
Proposal	Bidder's submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP.
RBSA Work Group	A committee of utility and energy efficiency organization representatives who are affiliated with NEEA through direct or indirect funding. These representatives also include individuals from the NWPCC and the RTF. They provide decision support, expertise, and regional coordination in collaboration with NEEA staff to support the 2027 RBSA.
Selection Committee	A subset of RBSA Work Group members working with NEEA to select a qualified firm or firms to implement the 2027 RBSA.
Single Family	One-to-four-unit residences, including: Attached or detached housing units, manufactured homes, duplexes, triplexes and quadplexes.
Stakeholders	Individuals and organizations who work closely with NEEA and rely on the data collected by the RBSA. This typically includes NEEA funders, the NWPCC, and the RTF.

#### 1.4 Additional Resources

2022 RBSA Method Report	<a href="https://neea.org/wp-content/uploads/2025/03/2022-Residential-Building-Stock-Assessment-Methods-Report.pdf">https://neea.org/wp-content/uploads/2025/03/2022-Residential-Building-Stock-Assessment-Methods-Report.pdf</a>
ESRI Survey123	<a href="https://www.esri.com/en-us/arcgis/products/arcgis-survey123/overview">https://www.esri.com/en-us/arcgis/products/arcgis-survey123/overview</a>
Marketing Systems Group	<a href="https://www.m-s-g.com/pages">https://www.m-s-g.com/pages</a>
NCES Locale Classifications	<a href="https://nces.ed.gov/programs/edge/Geographic/LocaleBoundaries">https://nces.ed.gov/programs/edge/Geographic/LocaleBoundaries</a>

## 2 Overview

This RFP will result in a research study called the 2027 Residential Building Stock Assessment and will be referred to interchangeably as the “2027 RBSA,” “RBSA,” or “Study.” The 2027 RBSA will collect data that will support analysis of energy use and characteristics, including installed equipment of single-family homes (including manufactured and mobile homes) and multi-family tenant units in the Northwest Region. The 2027 RBSA will be conducted on behalf of NEEA and its Funders. See section 5 for more information on the Study’s scope.

## 3 Objectives

The data collected by the 2027 RBSA will be used for a diverse set of analytical needs that include:

1. BPA’s energy efficiency market research and momentum savings models.
2. Utility energy efficiency programs, integrated resource plans, and conservation potential assessments.
3. NEEA’s energy efficiency market transformation activities.
4. NWPCC’s Power Plans.
5. The RTF’s energy efficiency Unit Energy Savings measures.

This RFP is split into two (2) separate focus areas (each referred to individually as “Focus Area 1” and “Focus Area 2” or collectively as “Focus Areas”):

1. Study Design and Implementation; and
2. Field Data Collection.

Bidders or teams of Bidders may submit Proposals for each Focus Area **separately**. Bidders who wish to be considered for the entire Study (i.e., both Focus Areas) should submit two (2) Proposals, one for each Focus Area. Bidders submitting Proposals for either Focus Area have the option to include additional tasks or services in their Proposal, as described in [Section 7](#).

All Awardees will be expected to actively collaborate and share resources, insights, and progress updates to ensure the Study’s success. Additional information on collaboration between Awardees can be found in Section 5.1.

NEEA will meet regularly with a subset of Funders to coordinate and solicit input on the Study; this collection is known as the “RBSA Work Group” and, interchangeably, the “Work Group.” NEEA, including its staff members, the Program Manager, and a subset of the RBSA Work Group members, will serve on the Selection Committee. The Selection Committee is dedicated to evaluating and selecting third-party contractors to participate in the Study.

## 4 Bidder Qualifications

NEEA and the Selection Committee require Bidders to have the following qualifications and experience to be considered as a Finalist or Awardee:

### Focus Area 1: Study Design and Implementation

- Ability to design and manage large residential surveys with complex sample designs.
- Ability to design, test, and deploy large and complex survey instruments.
- Ability to conduct highly effective multi-mode recruitment, including the option for in-person recruitment, to achieve the highest response rates possible.
- Ability to design and implement compelling and effective recruiting materials.

- Ability to quickly adapt to and meet tight timelines and unforeseen resource needs.
- Effective communication and public speaking.
- Experience conducting high-quality data, statistical, and spatial analysis (e.g., Python, R, SAS, etc.).
- Software/data engineering experience.
- Publication-quality reporting.
- Publication-quality data products.
- Experience in the residential and multi-family sectors.

## **Focus Area 2: Field Data Collection**

- Project management expertise and the ability to quickly adapt to new approaches.
- Certified engineering expertise in single-family homes and multi-family tenant units.
- Ability to serve as engineering domain experts and provide user feedback for survey instrument design and development.
- Effective data collection and data QA/QC.
- Proactive and cost-effective site visit scheduling.
- Ability to work closely with the recruiting team to maximize Study response rates.
- Ability to quickly adapt to tight data collection timelines and associated field data collection resourcing needs.

## **5 SOW for Focus Area 1: Study Design and Implementation**

The 2027 RBSA's Focus Area 1 will include six (6) main tasks and their associated sub-tasks, as set forth below. Most Study Deliverables will include at least one (1) round of review by NEEA and then the RBSA Work Group. Proposals should estimate and factor in an average of three (3) days for NEEA's review of Deliverables, and two (2) weeks for the RBSA Work Group review of Deliverables. Work Group reviews will be sequenced around monthly Work Group meetings scheduled by NEEA.

### **5.1 Task 1: Stakeholder Engagement**

Many Stakeholders are expected to utilize data from the 2027 RBSA; the Awardee of Focus Area 1 will assist NEEA in coordinating with Stakeholders using the following three (3) channels:

1. **Monthly RBSA Work Group meetings:** The Awardee of Focus Area 1 should plan to participate in NEEA's monthly RBSA Work Group meetings. Meetings are typically one to two (1-2) hours but may, on occasion, be up to four (4) hours, especially in the Study's planning stages. The Awardee of Focus Area 1 will proactively recommend agenda topics two (2) weeks prior to each Work Group meeting. NEEA will decide which agenda items to include in these meetings, whether the Awardee will attend, and which portions of Work Group meetings require the Awardee to prepare and present. Bidders' proposed schedule for Focus Area 1 should assume attendance at the Work Group meetings each month.
2. **Webinars:** NEEA plans to coordinate RBSA webinars to provide updates to a public audience such that they sync with major Study milestones. This public audience typically includes utilities in the Northwest Region, NEEA staff, and industry representatives. The Awardee will present Study updates at each webinar. Webinars are typically one (1) hour long and may start in Q2 2026 and continue throughout the Study's duration.
3. **Utility coordination:** The Northwest Region includes a mix of public- and investor-owned utilities whose customers may participate in the RBSA. To assist in efforts to recruit utility customers for the Study, Awardee will submit email notices to utilities no later than two (2)

weeks before recruitment begins in each utility’s territory. These email notifications will provide utilities with the recruitment timeline, estimated number of sampled households in their territory, outreach materials, a Study FAQ, and any other resources deemed necessary by NEEA and the RBSA Work Group. The Awardee will also help NEEA coordinate with BPA’s Energy Efficiency Representatives, who manage relationships with Indirect Funders.

At the start of the Study, the Awardee and NEEA will develop a communications plan clarifying roles, responsibilities, key points of utility engagement, and timing of all utility outreach.

## **5.2 Task 2: Sample Design and Weighting**

At the start of the Study, the Awardee of Focus Area 1 will develop a sampling and weighting plan with input from NEEA and the RBSA Work Group to cover the topics outlined below. Based on the Study priorities detailed below, Bidders’ Proposals should make interim sample design and weighting recommendations.

For the purposes of this RFP, Bidders should aim to complete 1,400 site visits.

### **5.2.1 Estimators, Domains, and Strata**

#### **5.2.1.1 Estimators**

The 2027 RBSA will identify one or more key characteristics aka “estimators” to guide the Study’s design. NEEA anticipates that many analyses of the 2027 RBSA will include calculating totals (e.g., percent of water heaters in the Northwest Region that are Heat Pump Water Heaters, etc.) and percents (e.g., number of homes with a ducted heat pump, etc.). To inform the Study’s sample design, Bidders should review the following list of possible estimators (see Section 5.2.1.2) and include key considerations that NEEA and the RBSA Work Group have factored into determining one (1) or multiple estimators:

1. **Totals:** energy use; and
2. **Proportions:** 50% of household units

#### **5.2.1.2 Study Domains and Stratification**

NEEA and the RBSA Work Group seek **90% confidence and 10% precision** in the selected estimator/estimators for the following Study domains or strata, listed in rough order of priority:

1. Region (See Figure 1)
2. Individual States in the Northwest Region (i.e. Idaho, Montana, Oregon, and Washington)
3. Housing Type (Single Family, excluding Manufactured Homes; Manufactured Homes; and Multi-Family)
4. Heating Zone (HZ 1 in one group, and HZs 2 and 3 in another)
5. Urbanicity (NCES Locales: City, Suburban, Town, and Rural)







### **5.3 Task 3: Recruitment**

At the start of the Study, the Awardee of Focus Area 1 will develop a recruitment plan with input from NEEA, the RBSA Work Group, and the Awardee of Focus Area 2. Bidders should make interim recommendations as part of their Proposal based on the priorities listed below.

#### **5.3.1 Recruitment Strategy**

The 2022 RBSA had an overall response rate of 0.6%, comprising a total of 1,910 site visits. The 2017 RBSA had an overall response rate around 1.3% comprising a total of 2,053 site visits. NEEA and the RBSA Work Group seek to increase this response rate for the 2027 RBSA into double digits, characterizing “completed site(s)” as a participant with a completed web survey, physical or virtual site visit (and, if necessary, associated signed participant agreement), and a signed billing data release authorization form. Proposals should specify the response rate Bidders expect to achieve within their proposed budget. Bidders should also outline the multi-mode approaches they plan to use, noting which are proven and which are novel or untested.

#### **5.3.2 Incentives**

Bidders should recommend which monetary or other incentives best balances budget and response rates. NEEA anticipates that there will be separate incentives for any heat loss testing to help recruit respondents. Bidder will break out the Study’s incentive budget separately from all other tasks. Proposal budgets should include incentives as Bidder’s own sub-task.

#### **5.3.3 Outreach Materials**

The Awardee will work with NEEA and the RBSA Work Group to develop compelling outreach materials to earn residents’ trust and cooperation. These materials are anticipated to include:

1. A Study brochure and FAQ.
2. A neea.org RBSA participant landing page with an overview of the Study and a link to the FAQ.
3. Web URL forwarding from neea.org to any web surveys.
4. An overview of a site visit and the data collected while on-site.

#### **5.3.4 Recruitment and Case Management**

Proposals should address how Bidders will track, document, and manage the Study caseload, including specifics on what platforms or systems they will use. The Awardee will be expected to develop weekly reports on response rates by strata and other relevant characteristics, throughout the Study. Bidders should discuss how they plan to use response rate tracking and case management to adjust recruitment approaches, as needed, to achieve response rate targets.

At the Study’s conclusion, the Awardee will deliver to NEEA a table of participants that includes, but is not limited to, names, addresses, latitude and longitude, and all relevant contact information, (i.e., participant phone number and email address).

### **5.4 Task 4: Instrumentation**

At the start of the Study, Awardee will develop a data collection plan that explores the following questions and topics: what information will be collected via a web survey; what information will be collected via an on-site instrument; the design and wording for a participant agreement (aka a release of liability form) and billing data release form; mechanisms by which participants will complete participant agreements and billing data release forms; and what systems will be used to collect billing data. The data collection plan will also specify how the signed documents will be

stored and organized such that batch billing data requests can be made to the appropriate utilities upon completion of all site visits. With input from the RBSA Work Group, NEEA will review and approve this data collection plan.

At the outset of Awardee's Study planning, NEEA will provide a prioritized list of data elements to be collected by the Study, as well as the instruments used in the 2022 RBSA. Using these documents and files, the Awardee will work with NEEA and the Focus Area 2 Awardee to determine which information to collect via web survey and which information to collect via the on-site survey instrument. Based on these decisions, the Focus Area 1 Awardee will update the existing survey instrument to strike a balance between data collection goals and budget.

**Focus Area 1 Awardee will deliver all web and on-site survey instrument specifications to NEEA once the tools are complete; Awardee will also provide NEEA with updated specifications, if any revisions are made to either tool during the Study.**

#### **5.4.1 Web Survey**

NEEA and the RBSA Work Group anticipate using a web survey to assess survey respondents' eligibility, at a minimum, to potentially complete the on-site participant agreement (release of liability) form and the billing and AMI data release form, and to collect other information about their home. Historically, demographic data has been collected via the on-site survey instrument. Bidders should recommend what types of information should be collected via a web survey.

NEEA has made use of Qualtrics and Blaise to support previous stock assessments due to their ability to automatically save partial responses, inclusion of data security features such as respondent passwords, and support for complex form structures and skip logic. Bidders should specify what solution(s) they propose and clearly state whether the proposed solution supports the required features specified above.

#### **5.4.2 Liability Release, Billing, and AMI Data Release Forms**

NEEA anticipates that participants will need to sign two forms: a release of liability form, known as a participant agreement, and a billing and AMI utility data release form. Bidders should discuss their approach for working with NEEA's legal department to agree on wording for each form, recommend how to ensure these forms comply with individual utility data request procedures, and recommend when and how these forms will be completed by participants (e.g., through a web survey, DocuSign, etc.).

#### **5.4.3 On-site Visit Data Collection Instrument**

The Awardee will adapt the 2022 RBSA ESRI Survey123 XLS form to meet the data collection priorities identified for the 2027 RBSA. These priorities include information on appliances, building envelope and air leakage results, coordinates of the residence, HVAC equipment and systems, HVAC testing results, lighting, plug load, and water heating.

Bidders should familiarize themselves with the ESRI Survey123 software and describe their experience with it. Bidders may recommend alternative tools only if they can demonstrate that the alternative tool can more effectively meet the Study's need for reliable off-line data collection, the ability to create complex forms with skip logic and repeats, effective case management, and NEEA ownership of the tool at the Study's conclusion.

## 5.5 Task 5: Billing and AMI Data Collection

To ensure high fill rates for electric and natural gas billing and AMI data, participants will be required to sign a billing data release form for electric and natural gas usage data to receive a participation incentive. Residents who live in a master metered building or do not manage their own electric or natural gas accounts may be exempted.

Once site visits are complete, the Awardee will submit billing data requests to utility service providers. Bidders should discuss what a realistic timeline for billing data acquisition may look like, how Bidder will manage billing data requests to utilities in a way that ensures prompt and complete participation by utilities, and what platforms Bidder will use to collect data submissions.

## 5.6 Task 6: Data Quality Control, Preparation, Analysis, and Reports

NEEA will develop and post data and reporting deliverables on neea.org at the Study's conclusion. Throughout the process of developing data and reporting deliverables, the Awardee will be responsible for flagging data discrepancies, errors, or unexpected missing values, working with the Focus Area 2 Awardee to resolve them.

### 5.6.1 Data Tables, Dictionary, and Guide

In close coordination with NEEA and the RBSA Work Group, Awardee will develop the structure of the final data Deliverables (a list of tables and the fields in each table) to be published publicly on NEEA's website at the Study's conclusion. Bidders should factor in sufficient time and budget to support multiple rounds of increasingly extensive reviews of all draft datasets by the RBSA Work Group and NEEA representatives. The anticipated Deliverables are as follows:

1. **CSV Database:** This database will consist of a set of CSV files that contain anonymized (i.e., no personally identifiable information) but granular detail from the survey instrument and other calculated fields including, but not limited to, the calculated fields discussed in Section 7. The data will be structured in a relational format, with some tables containing multiple rows of data per site. The Database audience will be data analysts who are comfortable using tools like R and Python to join and transform data, prior to analysis.
2. **Analytical CSVs:** This set of CSVs will summarize commonly used fields into tables organized by category. Each row in a table will represent a single site, and the audience will be data analysts who are proficient in Microsoft Excel but do not have the skills to join or extensively transform data prior to analysis.
3. **Data Dictionary:** A spreadsheet listing and defining all collected and calculated fields included in the final dataset and associated meta-data, including a comprehensive list of response options and methods used to calculate each field.
4. **User Guide:** A document providing background on the Study and relevant details for data users. The guide will discuss and explain how to combine data tables (i.e. proper table joins), applying weights, and quantifying uncertainty.

### 5.6.2 Final Report

A final report will be developed by the Awardee and published publicly on NEEA's website at the Study's conclusion. The final report will include the following sections:

1. **Executive Summary:** A high-level summary of key findings from the 2027 RBSA. The audience for this document includes executives and program managers seeking high-level information about the 2027 RBSA.

2. **Findings:** An extensive summary of analytical findings from the 2027 RBSA. The audience for this document includes program managers considering residential energy efficiency opportunities and programs.
3. **Methods:** A detailed retrospective on all Study methods and outcomes, including but not limited to sampling, recruiting, and weighting. The audience for this document includes individuals with technical expertise who wish to better understand how the Study was designed and implemented.
4. **Data Collection Protocols:** A copy of the final set of data collection protocols used throughout the Study. The audience for this section includes data users who wish to better understand how data was collected. This section may also be merged into the Methods section.
5. **Appendix:** This section is anticipated to include copies of recruiting materials and summary statistics for key technologies and building characteristics.

## 6 SOW for Focus Area 2: Field Data Collection

The 2027 RBSA's Focus Area 2 will include three (3) main tasks and their associated sub-tasks, as set forth below. Most Study Deliverables will include at least one (1) round of review by both NEEA and the RBSA Work Group. Proposals should estimate and factor in an average of three (3) days for NEEA's review of Deliverables, and two (2) weeks for the RBSA Work Group review of Deliverables. Work Group reviews will be sequenced around monthly Work Group meetings scheduled by NEEA.

### 6.1 Task 1: Stakeholder Relations and Study Planning

The Awardee of Focus Area 2 will join weekly check-in meetings with both NEEA and the Awardee of Focus Area 1, and over time, NEEA anticipates that the Awardee of Focus Area 2 will meet weekly with the Awardee of Focus Area 1 separately. During the planning stage of the Study, Awardee will stay informed of the sample design and recruitment plan to help ensure site visit scheduling and data collection are appropriately factored into the overall Study plan.

The Awardee for Focus Area 2 may be requested to join some Work Group meetings or webinars to help solicit input on a given topic, provide key updates, or answer questions about the engineering portions of the Study. Bidders should assume they will join no fewer than five (5) Work Group meetings and two (2) regional webinars, for at least one (1) hour each.

### 6.2 Task 2: Survey Instrument Engineering Support

#### 6.2.1 On-site Survey Instrument Development and Testing

The Awardee of Focus Area 2 will provide critical engineering input and feedback to the Awardee of Focus Area 1 to ensure the 2022 RBSA survey instruments are successfully updated to meet 2027 RBSA priorities, culminating in testing the instrument in real world environments prior to the start of site visits. Bidders should describe their approach to providing useful feedback to instrument developers and how they will incorporate testing prior to, and during, initial site visits to ensure the instrument requires minimal or no adjustments once initial site visits are complete and the Study is ready to scale up recruiting and site visit activities.

#### 6.2.2 Data Collection Protocols and Training

The Awardee of Focus Area 2 will update the 2022 RBSA protocols document and develop training materials to train and support field technician's activities. These materials will guide field technicians' activities, starting with site visit scheduling and finishing with incentive delivery. These

protocols will be based, in part, on the site visit data collection instrument and include any other protocols relevant to the site visit, including possible completion of the web survey, participant agreement signing, and billing release form completion and signing.

### **6.2.3 Quality Assurance**

With the Awardee of Focus Area 1's review and feedback, the Awardee of Focus Area 2 will develop and implement a quality assurance plan that lists automated and manual checks, undertaken throughout the Study to ensure field technicians are collecting data accurately. Bidders should outline their proposed approach for quality assurance in their Proposal, providing examples where possible.

## **6.3 Task 3: Data Collection**

### **6.3.1 Site Visit Scheduling**

To ensure the highest response rate possible, Awardee of Focus Area 2 will be responsible for scheduling all site visits in a prompt, reliable, professional, and cost-effective manner. Bidders should outline their approach to site visit scheduling and demonstrate how their approach will meet these goals. Bidders should describe any coordination points with the Awardee of Focus Area 1 that may be required for effective and successful scheduling.

### **6.3.2 On-site Data Collection**

Awardee will be responsible for conducting site visits in a cost-effective, safe, and professional manner. Proposals should describe Bidders' approach to site visits, whether remote site visits may be feasible for any housing types, how many field techs will participate in a site visit, how much time Bidder anticipates site visits will take based on the size of a residence and any heat loss testing that will be done, their approach to collecting accurate information on home insulation levels, and what approaches to site visits Bidder will use to ensure the safety of residents and field technicians. Bidders should outline what educational or training backgrounds should be required for field technicians to ensure they can collect data accurately, cost-effectively, and consistently.

For the purposes of this RFP, Bidders should assume 1,400 site visits will be completed.

### **6.3.3 Heat Loss Testing**

To assess outdoor air leakage, HVAC duct air flow, and duct leakage in homes, a Blower Door Test will be conducted on 400 homes, TrueFlow testing will be done on 300 homes, and Duct Blaster testing will be conducted on 300 homes. Bidders should demonstrate their experience with these tests and discuss how these tests will be factored into cost-effective site visit scheduling and data collection. While NEEA anticipates that all three tests will be conducted on 300 ducted homes, and a Blower Door Test will be conducted on 100 non-ducted homes, Bidders should recommend a defensible approach to meeting these targets.

## **7 Optional SOW: Energy Consumption and Heat Loss Rate Analysis**

The tasks listed below are considered necessary for the Study but do not fit in neatly as part of either Focus Area. Since these tasks will take place near the end of the Study and require unique skillsets and knowledge, NEEA will assess them independently from Bidders' responses to the Focus Areas. Bidders for either Focus Area may bid on this SOW or, alternatively, express how they would coordinate the completion of these tasks with the other Awardee. Proposals for this Optional SOW should not exceed three (3) pages and will not count towards any other page limits.

## 7.1 Energy Consumption Data Analysis

Awardee will develop an energy consumption data analysis plan that outlines their approach to the analyses listed below, delivering said plan to NEEA and the RBSA Work Group for their review. Once the plan has been approved, Awardee will conduct the analysis and deliver site-level data to the Focus Area 1 Awardee for inclusion in all final published Study datasets.

1. Billing Data Weather Normalization and Analysis: The collected billing and AMI data will be weather normalized, and an estimate of the electric heating energy use of each home will be developed.
2. AMI Data Analysis: Average hourly, weather normalized, load profiles will be developed for each site and broken out by relevant characteristics, such as weekend vs weekday, season, and gas vs. electrically heated homes, among other characteristics.

## 7.2 Heat Loss Rate (UA Value)

Awardee will use insulation values collected by Focus Area 2 Firm during the on-site visits to develop a heat loss rate, known as UA (see 2022 RBSA Methods report for more details) for all single-family residences. Awardee will conduct the analysis and deliver site-level results to the Focus Area 1 Awardee for inclusion in the final Study datasets.

## 8 Timeline

The following Gantt chart reflects the preliminary timeline for the Study. Bidders should assume most or all data will be collected by the end of 2027 and use this proposed timeline as a starting point to develop their own.

	2026				2027				2028			
Milestone/Task	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Contractor selection												
Contractor onboarding												
<b>Study Design and Implementation</b>												
Stakeholder engagement												
Sample design												
Recruitment												
Instrumentation												
Weighting												
Billing and AMI Data Collection												
Data Quality Control, Preparation, Analysis, and Reports												
<b>Field Data Collection</b>												
Study Planning												
Survey Instrument Engineering Support												
Data Collection												
<b>Energy Consumption and Heat Loss Rate Analysis</b>												
Billing and AMI Data Analysis												
Heat Loss Rate (UA Values)												
<b>Study Conclusion</b>												
Data and reports pulished on neea.org												

## 9 Budget and Sample Size

For the purposes of this RFP, Bidders should assume a total Study budget of \$4 million and a target sample size of 1,400 for Single Family (including Manufactured Homes) and Multi-Family, combined. Aside from the overall Study budget, there is no limit on the budget for each Focus Area. Once both Awardees are under contract, NEEA will work with both contractors throughout the Study's planning phase (see Sections 5.1-5.3 and 6.1-6.2) to finalize budget and site count goals.



## 10 Proposal Submission

Bidders may submit one (1) Proposal for a single Focus Area or two (2) Proposals, one (1) for each Focus Area. Bidders must submit one (1) electronic copy of their Proposal(s) by 5:00 p.m. PST of the business day identified in the RFP Schedule below to NEEA's RFP Point of Contact. NEEA may alter or adjust the RFP Schedule in its sole discretion, without further notice.

### 10.1 RFP Schedule

<b>January 7, 2026</b>	RFP Posted
<b>January 19, 2026</b>	Intent to Respond Form due (optional)
<b>January 19, 2026</b>	Deadline to submit questions
<b>January 26, 2026</b>	Answers to questions e-mailed back
<b>February 13, 2026</b>	Proposals due
<b>March 6, 2026</b>	Selection of Finalists
<b>March 16-20, 2026</b>	Finalists' presentations
<b>March 27, 2026</b>	Anticipated award decision
<b>May 8, 2026</b>	Anticipated contracting negotiations
<b>May 22, 2026</b>	Anticipated Work start date under Contract

### 10.2 RFP Point of Contact

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

Neil Yetz  
Survey Program Manager, Energy Use Studies  
E-mail: [nyetz@neea.org](mailto:nyetz@neea.org)

### 10.3 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.

## 11 Selection Criteria & Insurance Requirements

### 11.1 Scoring and Evaluation

Bidders are rated by the Selection Committee in terms of the overall responsiveness to the RFP (i.e., how well each Bidder addresses all RFP requests), including but not limited to:

1. Responsiveness to the RFP and demonstrated understanding of the issues surrounding each Scope of Work.
2. The thoughtfulness and appropriateness of the proposed methodology used to accomplish the Study's desired results.
3. The experience and qualifications of the individuals Bidder proposes to execute and manage the Study.
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 treats 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.*

## **11.2 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 NEEA's 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.

## **11.3 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.

## **11.4 Website and Marketing Materials**

Any marketing, promotional, or informational materials designed and developed under the awarded Scope of Work by the awarded contractor shall follow applicable guidelines as set forth in the NEEA Brand Standards and Communication Guidelines document found at <http://neea.org/contracts>. NEEA must review and approve all materials.

The Awardee will be responsible for securing the appropriate licenses to and ownership of, on behalf of NEEA, its Funders, and other contractors, all imagery (e.g., photographs, art, etc.), fonts, audio or video recordings, likeness, written documentation and other media incorporated in, developed, or acquired as part of the awarded Scope of Work. The Awardee shall submit all media developed for the awarded Scope of Work in two formats: (1) a "market-ready" (or consumer-

facing) format, and (2) a native (or editable) format that is compatible with both Apple and PC platforms.

## 12 Proposal Format

### 12.1 Proposal Document

Excluding Appendices, Proposals for either Focus Area should not exceed twenty (20) pages and should follow the structure below. Bidders may optionally include a cover letter, not to exceed one page.

1. **Executive Summary (1-page maximum)** – State your understanding of the scope and key objectives of the Study. Include the key strategies and approaches to executing the 2027 RBSA, proposed costs, key drivers of costs, anticipated recruitment response rates, average cost per site, which Focus Area this Proposal is for, whether you're including the optional SOW, and the reasons NEEA should select your team.
2. **Project Team Identification (2-page maximum)** – Provide information regarding the proposed project team, including company background, hierarchical team structure, and any subcontractors with whom Bidders intend to team. Project team bios and/or resumes should be included in the Appendix section.
3. **Proposed Methods and Approach (15-page maximum)** – Provide information regarding the specific methods and approaches to be undertaken to complete the Focus Area of this proposal, and the optional SOW, if included in this proposal.
4. **Timeline (2-page maximum)** – Provide the proposed timeline for all major tasks, sub-tasks, milestones, and associated Deliverables.
5. **Proposal Appendix** – Appendix materials do not count against the twenty (20)-page maximum and should include the following:
  - Company Background & Qualifications.
  - Project Team Bios – Include information about program team members and team structure, past team efforts on similar work, years of experience and other relevant qualifications.
  - Alternative approaches and associated costs that should be considered for the Study.
  - Scope that did not fit into a Bidder's core proposal and associated costs.
  - Reporting and data product samples.

### 12.2 Project Costs Spreadsheet

A spreadsheet outlining costs should be provided with at minimum the following tabs:

1. **Cost Summary:** Provide total estimated costs for the Study. Costs should be summarized by Task, sub-task, and calendar year, in a single table, as follows:

Task/Year	2026	2027	2028	Total
Task 1				
Sub-task 1				
Sub-task 2				
...				
Task 2				
...				
<b>Total</b>				

2. **Cost Assumptions:** A detailed list of assumptions used to calculate all costs, clearly linked to the final cost estimates. At minimum, the following estimates should be included:
  - a. Recruiting costs: Average cost to successfully recruit a site, broken out by labor hours, and material costs.
  - b. Site visit costs: Average cost to conduct a single site visit, including scheduling, travel, accommodations, and labor hours.
  - c. Incentives
  - d. Anticipated response rates, including information on the proportion of number of anticipated completed sites to number of eligible sites in the sample frame, and the percent of total sites in the sample frame that may be ineligible to participate.
3. **Hourly Rate Sheet:** Hourly rate sheets for all proposed project team members, including estimated hours by task and any projected annual hourly rate increases.
4. **Remaining Scope (optional):** Costs for any scope that did not fit into a Bidders' core proposal. All assumptions mentioned above should be included as needed.
5. **Alternative Approaches (optional):** Costs for any alternative approaches that Bidders recommend NEEA and the Work Group should consider.

## Appendix A - Intent to Respond Form

**RFP #: 53232**

**Project Title:** 2027 Residential Building Stock Assessment

**NEEA Point of Contact:** Neil Yetz

**PLEASE PRINT:**

<b>Company's full legal name</b>	
<b>Address</b>	
<b>City, State, Zip</b>	
<b>Contact Name</b>	
<b>Contact Title</b>	
<b>Phone #</b>	
<b>E-mail</b>	
<b>Place an "x" below for the Focus Area(s) Company intends to respond to</b>	
<b>Focus Area 1: Study Design and Implementation</b>	<b>Focus Area 2: Field Data Collection</b>

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."

**List any relevant certifications below:**

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