

**Request for Proposal (“RFP”)
RFP # 53412- Advanced Commercial Water Heating
Engagement Support**



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1 Introduction

1.1 About the Northwest Energy Efficiency Alliance

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.

1.2 Acronyms and Definitions

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

Term	Definition
ACWH	Advanced Commercial Water Heating
Awardee	The Finalist chosen by NEEA to enter into pre-contract negotiations to complete the Work outlined in this RFP via a contract with NEEA.
Bidder	Any individual or firm submitting a Proposal to be considered for this RFP.
CWH	Commercial Water Heating
CWHS	Commercial Water Heating System
DHW	Domestic Hot Water
Dual Fuel Solutions (“DFS”)	A central CWHS consisting of an electric heat pump coupled with gas equipment, such as a boiler, tankless water heater, or tanked water heater.
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.
GHP	Gas Heat Pump
Key Partners	Manufacturers and Key Stakeholders
Key Stakeholders	Relevant distributors, installers, designers, and/or utility program managers, as agreed upon with NEEA.
Manufacturers	CWH manufacturers, including GHP and electric heat pumps
Program	NEEA’s ACWH Program
Proposal	Bidder’s submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP.
Work	The scope of work set forth under this RFP.

2 Background

NEEA's ACWH Program aims to accelerate market adoption of commercial GHP and DFS. Currently, ACWH is in the program development phase. Program work in this phase focuses on information gathering and assumption verification, including identifying market barriers and opportunities, clarifying product definition and validating performance, and targeted market engagement. By the end of this phase, NEEA hopes to define Program strategy and establish market interventions. To support these outcomes, this RFP will gather market insights via targeted engagements with Key Partners.

Ongoing industry engagement has been broad and focused on sharing learnings regarding ACWH market progress across the United States and Canada. The Program has engaged with GHP manufacturers, electric heat pump manufacturers interested in DFS, and extra-regional utility partners. NEEA has identified the need to approach engagement more strategically with a greater focus on the Northwest Region; therefore, this primary goal of this RFP is to develop and execute targeted engagement plans with Key Partners to strengthen existing relationships, glean market intelligence, identify goals and areas for collaboration, inform Program strategy, and fulfill needs specific to market acceleration in the Northwest Region.

In addition to market engagement, the Program is currently focused on performance testing and has two multi-family field demonstrations in progress. To support ongoing recruitment efforts to test in a hotel or full-service restaurant application, the Awardee will leverage engagement to identify leads for field demonstrations in the Northwest Region.

3 Objectives

This RFP will support the Program by engaging more strategically with Key Partners to strengthen relationships and advance the adoption of GHP and dual-fuel CWHS by developing and facilitating engagement plans for both Manufacturers and Key Stakeholders (each an "Engagement Plan" and, collectively, "Engagement Plans").

Engagement Plans will outline a strategy that includes recurring meetings and communications with Key Partners focused on gathering market intelligence and positioning NEEA as an agent for market advancement. The Program intends to engage more frequently with Manufacturers than Key Stakeholders to further strengthen those relationships. After finalizing the Engagement Plans, the Awardee will facilitate the planned engagement with Manufacturers and Key Stakeholders and include NEEA throughout all such engagement. Awardee will include five NEEA-identified Manufacturers and five Awardee-recommended Key Stakeholders in the Engagement Plans' facilitation efforts.

The Work's primary objectives shall include, but are not limited to, the following:

1. Engagement Plan Development
2. Engagement Plan Facilitation
3. Field Test Recruitment Support
4. Confirming Barriers and Opportunities
5. Program Strategy Recommendations
6. Identification of Opportunities for Future Engagement with Key Partners

4 Bidder Qualifications

Awardee will need to demonstrate strong technical, business, communications, and coalition-building capabilities with a strong track record of influence.

The following qualifications are preferred:

1. Strong technical expertise of the CWH and energy efficiency markets, including the Northwest Region's market conditions, relevant codes, GHP and dual-fuel system technologies, system design, and performance metrics.
2. Demonstrated ability to assess market dynamics, identifying barriers, leverage points, influencers, trends, and actionable insights.
3. Demonstrated ability to build and maintain effective relationships with upstream and midstream market actors to advance shared objectives.
4. Excellent communication skills, capable of translating complex technical information into clear, accessible language.
5. Proven project and program management capability, including managing timelines and budgets, meeting data management requirements, and applying adaptive management to achieve results.

5 Scope of Work

The Work will include three main tasks with associated sub-tasks, as follows:

1. Project Management
2. Engagement Plans Development and Facilitation
3. Reporting and Analysis

5.1 Deliverables

Awardee will, at minimum, complete each Deliverable listed below: each Deliverable may require draft and final versions, at NEEA's discretion. Bidders may include additional Deliverables in their Proposals, provided any such Deliverables are clearly tied to the Work and related Activities.

1. Project Management
 - a. Develop a Work Plan, outlining key milestones and timing.
 - b. Provide monthly progress reports to capture progress in a formalized memo.
2. Engagement Plans' Development and Facilitation
 - a. Review Program source materials to inform Engagement Plan.
 - b. Identify and receive NEEA approval on Key Stakeholders to be considered in Engagement Plans.
 - c. Develop a Manufacturer Engagement Plan and a Key Stakeholder Engagement Plan, each including goals, timelines, levels of engagement, and assumed outcomes.
 - d. Facilitate implementation of the Manufacturer Engagement Plan and the Key Stakeholder Engagement Plan.
 - e. Leverage engagement to identify up to three field test site candidates with a special focus on hotel and/or full-service restaurant applications.
3. Reporting and Analysis
 - a. Develop a Final Report and PowerPoint slide deck capturing goals and objectives, approach to plan development, engagement strategies and deployment, and program strategy recommendations.

5.2 Timeline

NEEA anticipates the Work to last for one year from the estimated launch date in May 2026 to the delivery of the Final Report in May 2027. Bidders are encouraged to propose a reasonable timeline that enables them to achieve the Objectives outlined in Section 3.

5.3 Budget

NEEA estimates the Budget for the Work to be between \$100,000-\$175,000 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.

5.4 Approach and Methodology

NEEA recommends Bidders structure their Proposal in the following manner:

1. Executive Summary – A summary that includes the key strategies and approach to completing the proposed scope of the Work, costs, and the reasons NEEA should select Bidder.
2. 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.
3. Project Timeline & Cost Estimate - Provide the proposed timeline for all major phases and milestones of the project broken out by proposed task and associated deliverables through May 31, 2027. Include the cost estimate for each task. A breakout of any direct costs and an hourly rate sheet for the project period may be included here or in the Proposal Appendix section.
4. Proposal Appendix Items
 - a. Hourly Rate Sheet – Provide the hourly rate and estimated number of hours for each project team member, by task (required if time & materials).
 - b. Company background and qualifications.
 - c. Project Team and Team Bios – Include information about proposed assigned program team members and team structure, past team efforts on similar work, years of experience, and other relevant qualifications.
 - d. Subcontractor Team and Company Information – Provide subcontractor company (and, when possible, individual) information, such as contact information, qualifications, and previous work with the prime contractors on similar projects. If the bidder only qualifies for work if a subcontractor is engaged, then a letter of intent from such subcontractor must be included in the proposal to qualify.
 - e. Examples of past or current work on related topics.
 - f. Evidence of strong relationships with Key Partners.

6 Proposal Submission

Bidders must submit one (1) electronic copy of the Proposal 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.

6.1 RFP Schedule

March 16, 2026	RFP published
March 23, 2026	Intent to Respond e-mailed to RFP Point of Contact
March 30, 2026	Deadline to submit questions
April 6, 2026	Answers to questions e-mailed back
April 13, 2026	Proposals due
April 20, 2026	Anticipated award decision
May 25, 2026	Anticipated Work start date under Contract

6.2 RFP Point of Contact

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

Jack Davidson
Sr. Program Coordinator
E-mail: JDavidson@neea.org

7 Selection Criteria & Insurance Requirements

7.1 Scoring and Evaluation

Bidders are rated by NEEA 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 the Scope of Work.
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 Bidder proposes 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 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.

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 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.

7.4 Incorporated Documents

NEEA has attached and incorporated the following documents for additional context and clarity:

Document	Description
NEEA 2026 Operations Plan	2026 Operations plan for the Program can be found on pages 65-66.
Market Research on Commercial Water Heaters in Select Commercial Buildings	Perceptions on GHPs in CWH.
Gas-Fired Absorption Heat Pump: Hybrid System Approach Field Study	Field test findings from GHP product in a multifamily application.
Robur Heat Pump Field Trial	Field test findings from GHP product in a large senior living facility.