

Request for Proposal (“RFP”) RFP # 53469



Heat Pump Water Heater (“HPWH”) Implementation RFP

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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” or “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 nea.org.

1.2 Acronyms and Definitions

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

Term	Definition
Awardee	The Finalist chosen by NEEA to enter into pre-contract negotiations to complete the work outlined in this RFP in a future potential engagement via a contract with NEEA
Bidder	Any individual or firm submitting a Proposal to be considered for this RFP
CEUs	Continuing Education Units
Distributors	Mid-stream actors who supply retailers and contractors with HPWHs
DOE	United States Department of Energy
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.
Funding Utilities aka Utilities	Utilities in the Region that fund NEEA to achieve agreed-upon energy savings targets
HPWH	Heat Pump Water Heater
Manufacturers	Producers of water heating technologies, including but not limited to HPWHs, standard electric water heaters, split system water heaters, etc.
NEEA	Northwest Energy Efficiency Alliance
OEM	Original equipment manufacturer
Program Manager	The NEEA employee responsible for managing the HPWH Program
Proposal	Bidder’s submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP

2 Background

NEEA's HPWH Program (the "Program") has been actively working in the residential water heating market for more than 15 years to increase adoption of HPWHs in the Northwest Region. The Program's overarching goal is to make HPWHs the preferred and dominant choice for residential electric water heating in both retrofit applications and new construction.

To advance this goal, the Program has worked across the supply chain to promote product innovation, improve performance standards, engage Distributors, increase installer confidence, and raise consumer awareness. As a result of these efforts, many foundational barriers have been meaningfully reduced, and HPWH adoption is steadily increasing. With the forthcoming 2029 Consumer Water Heating Standard (the "Standard"), the Program views the next 3-5 years as a pivotal period to focus its efforts on engaging the market in a way that motivates Manufacturers' representatives, Distributors, contractors, and other stakeholders to support continued HPWH adoption independently, ultimately enabling a more self-sustaining and durable market, and ensuring market readiness for the upcoming Standard.

3 Objectives

The purpose of this RFP is to solicit proposals from qualified Bidders to provide implementation services for the Program, using its market-facing brand and infrastructure Hot Water Solutions ("HWS"). These services should complement utility program efforts in the Region, as well as other NEEA program efforts, including consumer awareness campaigns and Manufacturer and product support in the Northwest Region. Proposals should apply recent and relevant research in designing each Bidder's Program approach, including NEEA's most recent [Market Progress Evaluation Report](#).

NEEA encourages Bidders to provide proven and creative solutions in the area(s) of work listed and described below. NEEA requests Bidders structure their Proposals to balance Program management efficiency and subject matter expertise.

Through this RFP, NEEA seeks to select a contractor to support Program implementation within the following areas:

1. **Program Management:** The selected contractor will manage day-to-day implementation activities and will provide adaptable, responsive Program support. The selected contractor will coordinate closely with the Program Manager and other third-party contractors and will provide regular programmatic and financial reporting.
2. **Supply Chain Engagement:** The Program seeks creative and strategic approaches to engage market actors in ways that increase HPWH sales and adoption. As indicated in the Background section, NEEA is prioritizing more targeted supply chain engagement at this stage in the Program lifecycle to ensure the market is equipped and positioned to increasingly support HPWH adoption over time.
3. **Training and Technical Support:** The selected contractor will focus on updating and maintaining HWS training content and developing a scalable "train-the-trainer" framework designed to build the capacity of market actors which may include Distributors and other entities working with the market to independently deliver training and technical support to HPWH installers and those entering the workforce.

3.1 Program Objectives

A successful Proposal will demonstrate thoughtful, creative interventions with market actors to support HPWH adoption, for example:

- Approaches using market intelligence and segmentation to inform Program design and implementation.
- Leveraging relationships with third-party contractors with specialized capabilities, such as market, technology, training, and other relevant skills.
- Use of a holistic view of the market to inform their implementation approach, including expected market evolution in the next three to five years.
- Demonstration of strong relationship-building skills to support sustainable impact and long-term value, capacity to handle confidential information, and understanding of market actors across the supply chain.
- A strong training plan addressing: i) context specific to climate zones throughout the Region; ii) a range of installation types; and iii) strategically planning for dissemination of information throughout the Region by a train-the-trainer approach which leverages relevant market actors.

4 Bidder Qualifications

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

1. Demonstrated, strong knowledge of water heating market and technology.
2. Subject-matter expertise in supply and sales chain operations, with the ability to apply such expertise strategically to market engagement and growth efforts.
3. Strong relationship management skills to develop, maintain, and support strategic market partner engagement across the supply chain.
4. Experience designing and delivering curriculum or training programs for adult learners, grounded in adult learning theory and best practices.
5. Demonstrated ability to collaborate effectively in a multi-stakeholder environment with third-party contractors, consultant teams, or NEEA-requested market actors.
6. Excellent written and verbal communication skills, with the ability to produce clear, professional, and audience-appropriate deliverables.
7. Technical and operational capabilities to meet NEEA data management requirements, including the sensitive handling and analysis of confidential market data.

5 Scope of Work

The Awardee will work with NEEA to design and implement strategies to engage the market and accelerate the adoption of HPWHs through the HWS brand. Activities are organized into the following areas of work, and Proposals should be structured around the activities and deliverables below. Bidders are encouraged to suggest creative and innovative approaches to implementing these activities.

5.1 Program Management

Activities

1. Coordinate HWS activities, taking a proactive approach to adapt to market needs and identify opportunities for support and engagement.
2. Provide actionable insights into market conditions and dynamics to inform HPWH strategy.

3. Collaborate with the Program Manager to develop plans and deliver specific activities and communications to support Program goals.
4. Coordinate and participate in internal and external meetings with NEEA and other third-party contractors and/or market actors.
5. Meet regularly with the Program Manager to discuss progress, challenges, market insights and any adjustments needed.
6. Provide feedback and insights on NEEA's strategic and operations plans.
7. Provide ad hoc support to the Program Manager.

Deliverables

1. A detailed, annual work plan and budget approved by the Program Manager.
2. A monthly Program activity report, including market actors' coordination summary, market partner engagement summary, key Program activities, key learning and insights into the market and progress toward work plan objectives, and budget/financial reporting.
3. A monthly financial forecast, broken out task-by-task for each month of the current year and each quarter for subsequent years, with explanations for forecast-to-actual variances of more than 5% at task level.
4. An annual Program activity report, detailing progress against the annual work plan, key learning and insights, and budget/financial reporting for the year.

5.2 Supply Chain Engagement

The Program currently engages primarily with Distributors and installers, NEEA is looking for the Awardee to shift the support more upstream, further leveraging Manufacturer representatives and Distributors to increase HPWH acceptance and promotion among installers. Bidders may propose which market actors to focus on and should design interventions appropriate to each selected group.

Activities

1. Propose and implement an approach to support increased HPWH sales and generate actionable market insights by engaging Manufacturer representatives and Distributors as primary leverage points. Proposals should describe strategies to motivate these market actors to prioritize and independently deliver trainings resources, and the support installers need to confidently adopt and recommend HPWHs. Bidders should identify and justify their selection of priority market actors based on expected impact on installer adoption and market sustainability. Engagement is not required across all market actor types or on an equal basis across the Region; rather, Proposals should demonstrate a targeted approach aligned with the Program's transition toward a more self-sustaining market.
 - a. Design and implement engagement or intervention strategies targeted to prioritize market actors.
 - b. Leverage existing NEEA relationships and/or establish new relationships, as needed, to support the proposed approach.
 - c. Support mechanisms that enable market actors to increase knowledge, confidence, or capability related to HPWHs.
 - d. Identify and apply metrics to assess engagement effectiveness and progress toward desired market outcomes.
2. The Program currently has data and delivers quarterly agreements with nine Distributors in the Northwest Region and delivers Distributor Sales/Market Intelligence Reports produced by NEEA's Data Management Team. The Awardee would support this effort, with insights and recommendations for improvement, including:

- a. Provide insights and recommend actions for improvements.
- b. Attend quarterly calls with NEEA to discuss Sales Reports.

Through engagement with the market, Awardee is expected to support continuous Program improvement by monitoring and reporting relevant factors in the water heating market such as water heater stock, supply chain strategies and engagement models, market demand changes, competitive landscape, and new market research availability. Awardee will also analyze such factors and work with NEEA to refine or develop new strategies to meet overall Program goals and remove market barriers.

Deliverables

1. Comprehensive supply chain engagement plans.
2. Market engagement tracker, updated monthly to record meetings with market actors.
3. Monthly report, summarizing progress to engagement plans and results achieved in the market.
4. Provide insights on Distributor Sales Reports.
5. Ad hoc analysis to support Program objectives.

5.3 Training and Technical Support

The Program currently offers both live and self-paced learning options that provide CEUs. Additionally, Program content is delivered to installers through a variety of existing channels, including Distributor-organized training events, shop talks with individual plumbing and HVAC businesses, and utility-hosted training events.

These efforts are installer-focused and provide introductory coverage of the technology, installation best practices, common questions, and sales considerations. The Program seeks to increase the rigor and relevance of these materials to better reflect the diversity of the Northwest Region and to effectively leverage existing training and delivery efforts rather than duplicating them.

Activities

1. Design a strategy to build and expand the knowledge capacity and confidence in the Northwest Region.
 - a. Identify gaps, update current curriculum, and develop new training and educational resources which complement and leverage existing content. Updated training resources should reflect the diversity of the Northwest Region and varying market needs. Resources may include materials, videos, and in-person or web-based training curriculum or scripts.
 - b. Manage CEU renewal process for HWS trainings.
 - a. Consider low-adoption areas and specific efforts to increase knowledge gap.
 - b. Develop and implement a “train-the-trainer” approach to strategically equip market actors including Distributors and other entities working within the market with resources to deliver HWS trainings for CEUs.
2. Proactively identify training opportunities and potential collaborations and coordinate on training delivery.
3. Provide insights and information on enhancements of technical materials for NEEA to explore, integrating findings into active training deliverables.
4. Update the hotwatersolutionsnw.org website (both consumer-facing site and installer-facing site) with technical and training resources, the installer finder, as well as incentive information for the Region.
5. Respond to technical questions sent to info@hotwatersolutionsnw.org.

Deliverables

1. Comprehensive training plan, including “train-the-trainer” framework.
2. Tracker recording Program trainings, attendance, and other NEEA-identified key performance metrics.
3. Trainings that promote HPWHs, delivered online or in-person, throughout the Region.
4. Updates to current training materials with new technical information integrated.
5. Updates to hotwatersolutionsnw.org, as needed.

5.4 Timeline

NEEA anticipates the contract award date for this work to be August 17, 2026 with a contract- and work-end date of March 31, 2028.

5.5 Budget

NEEA estimates the Budget for this work to be between \$1.2-\$1.5 million 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.

5.6 Approach and Methodology

NEEA recommends Bidders structure their Proposal in the following manner:

1. **Executive Summary** (2-page maximum): Include the key strategies and approach to completion of the scope of the work; proposed costs; and the reasons NEEA should select your team.
2. **Approach to Project (Tasks and Deliverables)** (10-page maximum): 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. **Proposed Innovation Strategies** (5-page maximum): Provide creative solutions for increasing HPWH adoption throughout the Region. Provide examples of how past innovations have been applied and what results occurred. Propose ways to equip market actors with resources and skills to disseminate HPWH information beyond the reach of the Program.
4. **Project Timeline & Cost Estimate** (3-page maximum): Provide the proposed timeline for all major phases and milestones of the project broken out by proposed task and associated deliverables. Include the cost estimate for each task. Provide a breakout of any direct costs and an hourly rate sheet in the Appendix section.
5. **Appendix section:**
 - a. Hourly Rate Sheet – Provide the hourly rate and estimated number of hours for each team member, by task.
 - b. Project Team & Team Bios – Include information about program team members and team structure, past team efforts on similar work, years of experience and other relevant qualifications.
 - c. Past performance - Examples of past work or related projects that illustrate relevant experience.

Please note that all proposals should adhere to a 20-page maximum, excluding appendices.

6 Proposal Submission

Bidders must submit one (1) electronic copy of the Proposal by 5:00 p.m. PDT 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

April 27, 2026	RFP posted
May 11, 2026	Intent to Respond Form due
May 11, 2026	Deadline to submit questions
May 15, 2026	Answers to questions e-mailed back*
May 29, 2026	Proposals due
June 16, 2026	Finalists selected
June 29-July 2, 2026	Finalist interviews
July 10, 2026	Anticipated award decision
August 17, 2026	Anticipated Work start date under Contract

*Note that similar questions may be grouped by subject to streamline responses.

6.2 RFP Point of Contact

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

Alex Merrill
Program Manager
E-mail: HPWH_ImplementationRFP@neea.org

6.3 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.

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 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.

7.4 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 shall be responsible for securing, on behalf of NEEA, its funders and other contractors, the appropriate licenses to and ownership of 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.

Appendix A - Intent to Respond Form

RFP #: 53469

Project Title: HPWH Program Implementation

NEEA Point of Contact: Alex Merrill, HPWH_ImplementationRFP@neea.org

PLEASE PRINT:

Company's full legal name	
Address	
City, State, Zip	
Contact Name	
Contact Title	
Phone #	
E-mail	

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

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

List any relevant certifications below:
