

4. Requirements¹

4.1 Work Plan

Contractor shall develop and submit to NEEA, for NEEA's approval, a detailed Work Plan. The Work Plan shall include all progress indicators for all Work, including but not limited to the following: expected results, timing, tracking and reporting requirements in a format acceptable to NEEA. All progress indicators and results must clearly link to Contractor's achievement of the overall goal(s) of the Work pursuant to this Statement of Work.

Contractor will:

1. Develop and submit to NEEA, for NEEA's approval, a detailed Work Plan with associated Budget(s) for all Work.
2. Coordinate and communicate Work Plan with NEEA, NEEA contractors as requested by NEEA, and all NEEA Permitted Subcontractors², as applicable.

4.2 Progress Reporting

Contractor will provide NEEA with timely and accurate documentation, including Monthly Invoicing and Monthly Progress Reporting to ensure Contractor's satisfactory performance and management of the Work under this Contract as determined by NEEA, including:

1. Monthly Invoice(s): Contractor will submit Monthly Invoice(s) to NEEA for payment in accordance with [NEEA's Invoicing Guidelines for Contractors](#).
2. Monthly Progress Reporting: Contractor will submit Monthly Progress Reports to NEEA along with each Monthly Invoice in accordance with [NEEA's Progress Report Content and Format Requirements](#).
3. Additional Progress Reporting: Contractor will respond in a timely manner to other NEEA requests for information to ensure Contractor's progress regarding the Work pursuant to this Contract.

4.3 Work Management

Contractor will provide all necessary and sufficient project management throughout the completion of this Contract to NEEA's satisfaction. Contractor will timely and fully perform all Work at or under Budget, including:

1. Coordinating and managing its Work under this Statement of Work and the Work of any NEEA Permitted Subcontractors, pursuant to this Statement of Work.
2. Providing NEEA with itemized expense reporting for its Work and for the Work of any NEEA Permitted Subcontractors in Monthly Invoice(s), including submitting copies of rate sheets to NEEA for NEEA Permitted Subcontractors upon NEEA's request.
3. Timely and direct hiring, oversight, and payment for all NEEA Permitted Subcontractors' costs, expenses, and fees related to the Work under this Statement of Work.

¹ With the exception of Section 4.6-Website Hosting and/or Development Requirements, these are the requirements set forth in every Standard NEEA Statement of Work (though the numbering may vary). If you have a question about these terms, please reach out to your NEEA contact so they can work with the Contracts/Legal team to address any concerns.

² This is a defined term and will be further defined in any applicable Statement of Work.

4. Timely delivery of all Work at or under Budget pursuant to this Statement of Work throughout this Contract's Term.

4.4 Work Product, Reports, and Product Quality

For all Work Product and Reports (i.e., including but not limited to memos, studies, reports, analyses, etc.) developed and prepared as part of this Contract's Statement of Work, Contractor and Contractor's NEEA Permitted Subcontractors will follow all NEEA guidelines set forth in [NEEA's Style Guide for Public Research Reports](#), [NEEA's Brand Standards and Communication Guidelines](#), and [NEEA's IP Policy](#). All Work Product and Reports that may be published publicly must be first submitted to NEEA for NEEA's review and preapproval prior to NEEA's authorized and permitted public publication and clearly and conspicuously identify any NEEA trademark and/or copyright notices.

Contractor and Contractor's NEEA Permitted Subcontractors will secure any and all required releases and licenses to ensure NEEA's exclusive ownership and use of all intellectual property, including all Work Product, of whatever kind or nature created or developed as part of, or related to, the Work under this Contract's Statement of Work, including but not limited to all copyrightable materials, all imagery (e.g., photographs, art), fonts, audio or video recordings, likenesses, written documentation, and all other intellectual property incorporated in, developed in conjunction with, or acquired as part of the Work (collectively, the "Media"). Contractor will deliver substantiation documentation to NEEA regarding all Media releases and licenses to NEEA as requested by NEEA throughout this Contract's Term and upon its conclusion. This provision survives termination of this Contract in perpetuity.

Contractor must submit all applicable Media developed under this Contract to NEEA 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. Contractor will take all actions reasonably requested by NEEA to vest any required use rights and exclusive ownership of all Media in NEEA as required under this Contract.

All Work Product and Reports developed and delivered by Contractor and any NEEA Permitted Subcontractor pursuant to this Contract's Statement of Work will be of professional quality that evidences well-written, detailed, accurate, and concise Work Product and Reports, as determined in NEEA's sole discretion. Related content should applicably include a description of the context of related research and identify all research objectives and methodologies, sampling approach, findings and conclusions relative to all research objectives. Draft reports prepared by Contractor and any Permitted NEEA Subcontractors must be provided to NEEA for review by NEEA and other NEEA designated parties prior to any acceptable Final Report and any NEEA permitted public publication. All Final Reports shall incorporate NEEA and other NEEA designated parties' feedback, as determined by NEEA, regardless of the number of required iterations.

4.5 Data Deliverable Protocols

Contractor will submit data and analytical products to NEEA that NEEA considers complete and accurate in its sole discretion as follows:

1. Data deliverables and analytical products submitted by Contractor are generally considered "complete" by NEEA if:

- a. All terminology in a dataset, or metadata associated with a dataset that a non-expert would not be reasonably expected to understand, is clearly defined in a data dictionary, appendix, or spreadsheet.
 - b. There is a codebook to indicate the content and characteristics of each variable such as response codes, codes used to indicate nonresponse and missing data.
 - c. All possible cell values for categorical variables are included in a data dictionary or codebook (e.g., heating system type, water heater fuel, City, State, ZIP Code).
 - d. All entries/cells in a dataset and metadata are spelled correctly and are consistently formatted. Data types must be consistent with a field's intended use (e.g., a field containing year or energy use is numeric, a field containing an address or name is text-based).
 - e. Columns representing a measured value will use a single unit of measurement for a given column. If multiple units must be included, there should be a column for each unit.
 - f. Computational scripts or description of QA and QC processes are shared.
 - g. All underlying sources of data used to create data and analytical products are clearly cited. For any dynamic data sources date of query or export is included.
2. Data deliverables and analytical products submitted pursuant to this Contract are generally considered “**accurate**” if they can be used in the manner intended (as defined in this Contract's Statement of Work and/or Work Plan) without additional transformation.
 3. NEEA will review all data deliverables and analytical products submitted pursuant to this Contract for completeness and accuracy.
 - a. If NEEA believes any data deliverables or analytical products are not complete or accurate (as defined above), NEEA will notify Contractor and Contractor will have ten (10) business days to provide:
 - An estimate for the time needed to correct NEEA identified potential errors, and
 - A planned date of delivery to NEEA of duly corrected data deliverables or analytical products.
 - b. Once any corrected data deliverable products and analytical products are delivered to NEEA, the process outlined in Subsection 3 above will be repeated as determined by NEEA. Contractor agrees and understands that NEEA will not compensate Contractor, or any NEEA Permitted Subcontractor, for any incurred time, expenses, or costs for time and materials required to correct any potential errors identified by NEEA under this Section.

4.6 Website Hosting and/or Development Requirements

Contractor, and its NEEA Permitted Subcontractors, must adhere to NEEA's [Website Security Policy](#) when developing, designing, updating, maintaining, or hosting any NEEA websites.

As part of these requirements, Contractor will be required to prepare and submit a website security brief to NEEA as required by NEEA outlining the steps that will be taken to secure any NEEA websites prior to initiating any NEEA website development work and prior to accessing any NEEA user accounts.