

Request for Proposal (“RFP”)

RFP # 53450

Heat Pump Water Heater Marketing



Table of Contents

1	Introduction.....	2
1.1	About the Northwest Energy Efficiency Alliance.....	2
1.2	About this RFP	2
1.3	Acronyms and Definitions	2
2	Background.....	3
3	RFP Objectives	3
3.1	Program/Initiative Objectives	4
4	Bidder Qualifications	4
5	Scope of Work	5
5.1	Activities and Deliverables	5
5.2	Timeline	6
5.3	Budget	7
5.4	Approach and Methodology.....	7
6	Proposal Submission.....	7
6.1	Proposal Format	7
6.2	RFP Schedule	8
6.3	RFP Point of Contact.....	8
6.4	Intent to Respond	8
7	Selection Criteria & Insurance Requirements.....	8
7.1	Scoring and Evaluation	8
7.2	Insurance Requirements	9
7.3	Website and Marketing Materials	9

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”).

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 About this RFP

NEEA is seeking a qualified contractor or team of contractors to provide marketing services for NEEA’s Heat Pump Water Heater program for an initial term through December 31, 2027, with the ability to extend the award term for up to an additional twenty-four (24) months at NEEA’s sole discretion.

1.3 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.
Distributors	Midstream market actors in the Northwest who supply Retailers and contractors with HPWHs.
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.
Funders	Organizations in the Northwest that fund NEEA to achieve agreed-upon energy savings targets.
Hot Water Solutions	The market-facing brand for NEEA’s Heat Pump Water Heater program, with two distinct audiences: Installers and consumers.
HPWH	Heat Pump Water Heater
Installers	Midstream market actors who purchase HPWHs from Distributors or Retailers and install them in consumers’ homes.
Manufacturers	Producers of water heating technologies, including but not limited to HPWHs, standard electric water heaters, and split system water heaters.

MPER	NEEA’s HPWH Market Progress Evaluation Report, published regularly to track Program progress, most recently in HPWH MPER #8 .
Proposal	Bidder’s submission detailing how they will accomplish the work, goals, and milestones set forth in this RFP.
Retailers	Retail outlets (e.g., Home Depot, Lowe’s, Ace Hardware, etc.) in the Northwest that sell HPWHs.
Senior Manager of Marketing Strategy	NEEA employee Britt Cutsforth Dawkins
Standard	The 2029 Consumer Water Heating Standard that will require an estimated 50% of newly-manufactured electric storage water heaters to utilize heat pump technology.

2 Background

NEEA’s Heat Pump Water Heater program has been actively working in the residential water heating market for more than fifteen (15) years to increase adoption of HPWHs in the Northwest. The Heat Pump Water Heater 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 Heat Pump Water Heater 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 Standard, the Heat Pump Water Heater program views the next three (3) to five (5) years as a pivotal period to focus its efforts on engaging the market in a way that motivates Manufacturers, Distributors, plumbing Installers, and consumers to support continued HPWH adoption independently, ultimately enabling a more self-sustaining and durable market and ensuring market readiness for the upcoming Standard.

3 RFP Objectives

The objective of this RFP is to solicit Proposals from Bidders to provide marketing services for the Heat Pump Water Heater program. These services should complement utility program efforts in the Northwest, as well as other NEEA efforts.

NEEA encourages Bidders to provide proven and creative solutions for the objectives listed below. NEEA requests Bidders structure their Proposals to balance program management efficiency and subject matter expertise.

Through this RFP, NEEA seeks a contractor to support the following objectives (alongside the Activities and Deliverables in Section 5.1, the “Work”):

1. **Marketing Project Management:** The selected contractor will manage day-to-day marketing activities and provide adaptable, responsive support. The selected contractor will coordinate closely with NEEA’s marketing lead, Heat Pump Water Heater program staff, and other third-party contractors, and provide regular programmatic and financial reporting.
2. **Marketing Strategy:** The Heat Pump Water Heater 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-side engagement to ensure the market is equipped and positioned to increasingly support HPWH adoption over time, but the selected contractor will also provide demand-side, consumer-facing marketing strategy.

3. **Marketing Content Development:** The selected contractor will work with NEEA's marketing lead to identify and develop marketing and training materials that support Distributor, Retailer, Installer, and consumer education and preference for HPWHs, alongside marketing contractors, as requested by NEEA.

3.1 Program/Initiative Objectives

A successful Proposal will demonstrate understanding of the Heat Pump Water Heater program's goals and provide thoughtful, creative interventions with market actors to support HPWH adoption, such as:

1. Clarify the HPWH value proposition for Installers, Distributors, Retailers, and consumers and produce clear messaging.
2. Demonstrate strong understanding of market actors across both the supply and demand chains, with an emphasis on ideas to help drive consumers to replace their existing electric resistance water heater.
3. Strategize and leverage the available communication channels, both internal (i.e., Hot Water Solutions) and external (i.e., Distributor-, Retailer-, and Installer-owned).
4. Collaborate with the Heat Pump Water Heater program's implementation team and support ongoing efforts with Distributors and Installers.

4 Bidder Qualifications

NEEA prefers Bidders have the following qualifications and experience to be considered as a Finalist or Awardee. Such experience should include but is not limited to:

1. **Marketing excellence:** A strong track record of marketing excellence, with outstanding written and verbal communication skills and the ability to produce consistently professional deliverables. Deep understanding of the importance of effective messaging.
2. **Market understanding:** Demonstrated knowledge of the energy efficiency industry and the residential water heating market.
3. **Collaboration:** Strong relationship management skills to develop, maintain, and support strategic market actor engagement and collaboration with other contractors and/or industry organizations. Demonstrated ability to collaborate effectively across functions.
4. **Project management:** Strong communication and organizational skills to manage projects with competing priorities. Ability to plan proactively, meet deadlines, and deliver high-quality work under tight schedules.
5. **Market Transformation knowledge and ability:** Clear understanding of how to apply Market Transformation principles to the Work, including identifying barriers to energy efficient-product adoption, potential leverage points, market influencers, and market trends.

6. **The Northwest knowledge:** Understanding of regional considerations, including the diversity of Funders, market actors, and customers in the Northwest.

5 Scope of Work

Awardee will work with NEEA to design and implement marketing strategies to engage the market and accelerate the adoption of HPWHs through the Hot Water Solutions 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 Activities and Deliverables

Awardee will, at minimum, complete the Deliverables listed below. Bidders may include additional Deliverables in their Proposals, provided any such Deliverables are clearly tied to the Work and related Activities. NEEA reserves the right to change or modify these Activities and Deliverables, in its sole discretion.

Marketing Project Management

1. Activities
 - a. Work with the Senior Manager of Marketing Strategy to ensure high levels of coordination to deliver specific marketing activities and communications in support of Program goals.
 - b. Align market strategies and coordinate marketing and marketing-related activities with other NEEA contractors and Funders, as directed.
 - c. Provide consistent communication and marketing project management and ensure delivery of Heat Pump Water Heater program marketing activities, as determined by NEEA and as outlined in the annual strategic marketing work plan.
 - d. Meet regularly with the Senior Manager of Marketing Strategy to discuss plans, progress, challenges, market insights, and/or any adjustments needed.
 - e. Provide ad hoc support to the Senior Manager of Marketing Strategy.
 - f. Manage the Work within the agreed-upon budget.
2. Deliverables
 - a. A detailed, annual Work plan and budget approved by the Senior Manager of Marketing Strategy.
 - b. A monthly Heat Pump Water Heater program activity report, including program marketing activities and progress toward marketing Work plan objectives, key insights into the market, and budget/financial reporting.
 - c. 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.
 - d. An annual Heat Pump Water Heater program activity report, detailing progress against the annual Work plan, key insights, and budget/financial reporting for the year.

Marketing Strategy

1. Activities
 - a. Provide strategic vision and recommended activities in annual strategic marketing planning to accelerate the adoption of HPWHs and position the technology as the preferred product for Distributors, Retailers, Installers, and consumers.

- b. Develop a Heat Pump Water Heater program-wide messaging platform to ensure it has a clear value proposition to each of its audiences in alignment with its ultimate goal of moving the overall market toward greater adoption and sales of HPWHs.
- c. Develop, create, and implement identified marketing campaigns with activities targeted to individual target audiences.

2. Deliverables

- a. Annual strategic marketing Work plan and budget approved by the Senior Manager of Marketing Strategy.
- b. Heat Pump Water Heater program messaging platform.
- c. NEEA-identified marketing campaigns.

Marketing Content Development

1. Activities

- a. Lead Heat Pump Water Heater program content strategy in support of educating Distributors, Retailers, and Installers and, ultimately, driving adoption of and preference for HPWHs.
- b. Review and update existing marketing materials to ensure content is on message and aligned with Heat Pump Water Heater program goals and develop a plan for content gaps.
- c. Review new materials created by the Heat Pump Water Heater program implementation team for industry events and trainings to ensure content is on message and aligned with its goals.
- d. Develop educational and best practices content for Distributors, Retailers and Installers in coordination with marketing contractors as identified by NEEA. Content should be developed to be leveraged across multiple marketing channels and mediums. Content may include but is not limited to:
 - i. Email newsletters, case studies, videos, fact sheets, technical guides, presentations, marketing toolkits, advertising, and general marketing collateral.
- e. In support of approved consumer campaigns, develop campaign-specific messaging that drives awareness of HPWHs and encourages early replacement of existing electric water heaters.
- f. Optimize, refresh, and manage the Hot Water Solutions marketing channels (i.e., www.hotwatersolutionsnw.org, www.installers.hotwatersolutionsnw.org, email, and, potentially, social media), as well as other NEEA-identified communication channels.

2. Deliverables

- a. Content strategy plan that incorporates Heat Pump Water Heater program objectives, a review of marketing deliverables, existing content analysis, and new content plan.
- b. Refresh existing and provide new Heat Pump Water Heater program-supporting marketing content.

5.2 Timeline

NEEA anticipates the Work to run from late September 2026 to December 31, 2027. Bidders are encouraged to propose a reasonable timeline that enables them to achieve the Objectives as outlined in Section 3 above.

5.3 Budget

NEEA estimates the Budget for the Work to be between \$80,000 and \$110,000 in 2026 and approximately \$180,000 and \$200,000 in 2027, 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 values a collaborative environment and encourages Bidders to incorporate their proven and creative experiences from other related work into their approach. NEEA is also interested in approaches which utilize market intelligence and segmentation to inform Program marketing strategies. Much of the requested Work performed by the selected contractor will require collaboration with Funders and other market actors.

NEEA's Market Transformation efforts rely on development of strong relationships to support lasting change. Bidders should demonstrate capacity to approach the Work in a way that supports strong relationship development and value over the long term. Bidders should utilize a holistic view of the market to inform their proposed implementation approach, including how the market is expected to evolve in the next three (3) to five (5) years.

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 Proposal Format

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 Bidder.
2. **Approach to Project (Activities 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 marketing strategy as well. Identify major phases and milestones for the project and the associated deliverables.
3. **Proposed Innovation Strategies (6-page maximum):** Provide creative solutions for increasing HPWH awareness and adoption throughout the Northwest. Provide examples of how past innovations have been applied and what results occurred. Propose ways to reach and communicate with target audiences about the value of HPWHs.
4. **Project Timeline & Cost Estimate (2-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 Bidder’s proposed 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 must adhere to a twenty (20)-page maximum, excluding appendices.

6.2 RFP Schedule

RFP posted to neea.org	Thursday, July 2, 2026
Deadline to submit questions to NEEA	Friday, July 10, 2026
Answers to questions emailed back	Thursday, July 16, 2026
Proposals due	Friday, July 24, 2026
Selection and notification of Finalists	Friday, August 7, 2026
Finalist presentations	Monday, August 24–Friday, August 28, 2026
Anticipated award decision	Wednesday, September 2, 2026
Anticipated contracting negotiation end	Friday, September 4, 2026
Anticipated Work start date under Contract	Monday, September 28, 2026

6.3 RFP Point of Contact

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

Britt Cutsforth Dawkins
Senior Manager, Marketing Strategy
HPWH_Marketing_RFP@neea.org

6.4 Intent to Respond

NEEA encourages interested Bidders to email the RFP Point of Contact with their name and email address so NEEA can provide them with updates to the RFP and send answers to any questions received. However, NEEA will consider all Proposals, even those from Bidders who have not submitted their contact information in advance.

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 set forth in Section 5, above.
2. The innovation, 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, including ability to deliver marketing services cost-effectively and proposed resource allocation.

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 Senior Manager of Marketing Strategy 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;
- 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 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.