

## Efficiency Vermont Weatherization Offers Study RFP Questions and Answers

Questions topics are presented in the following sequence:

- Questions about contact lists
  - Questions about research methods
  - Questions about results
  - Questions about proposal formatting
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### Questions about contact lists

**The RFP encourages a sample that is representative of Vermont homeowners who may qualify for Efficiency Vermont programs. Given the budget ceiling and low research panel incidence numbers for segmented research in Vermont, is VEIC willing to accept a small sample survey ~75-150 responses (with a higher margin of error) should an outside research panel approach be merited.**

A contact list will be provided that should be adequate to recruit a sample far larger than 150 respondents if this research proceeds using a method that requires a larger sample size. Estimated size of sample frame is approximately 8,000 residential utility account holders who have engaged with Efficiency Vermont in the past 24 months, and 60,000 residential utility account holders who may or may not have engaged with Efficiency Vermont in the past. VEIC will provide samples from these lists to the contractor as necessary, i.e., VEIC and the contractor will agree on the number of contacts to engage for recruitment and VEIC will provide that number of contacts to the contractor rather than the entire list.

VEIC expects results each of these groups (respondents who have, and respondents who have not, engaged with Efficiency Vermont in the past) will be included in the report. Most contacts in the sample frame will include email address, phone number, address of residence and, if the person has engaged with Efficiency Vermont previously, a summary of that engagement.

VEIC does not expect that the contractor will need to purchase a sample from a third-party vendor. In the event that is necessary, VEIC expects the contractor will propose an appropriate plan for adapting research methods as necessary to achieve project objectives in budget.

**The proposal reads “With either approach, the contractor will be expected to screen for basic demographic information to ensure a sample that is representative of Vermont homeowners who are Efficiency Vermont customers and to allow for stratified analysis by income.” Does this mean that**



**Efficiency Vermont/VEIC is interested in understanding which messages work (etc) for existing and past Efficiency Vermont customers, only? Please clarify this sentence, if possible.**

In this sentence, the phrase “who are Efficiency Vermont customers” is intended to refer to Vermont residents who are within Efficiency Vermont’s service territory. These individuals may or may not have personally interacted in Efficiency Vermont but are customers of a participating utility. This includes Vermont residents throughout the state with the exception of those served by Burlington Electric Department.

**Of the contacts that have had previous engagement with Efficiency Vermont, how do you characterize their engagement? What are the ways they have engaged with Efficiency Vermont that you have captured in your database (ex. rebate submission, mailing list subscriber, etc.)?**

Contact list for people who have engaged with Efficiency Vermont will include a brief summary of their engagement. This summary will include communication with the contact center and program participation (e.g., rebate submission). Mailing list participation may or may not be able to be matched to all contacts.

#### **Aggregated questions re: contact list details**

**How many contacts are included in the list that VEIC would make available for this research?**

**Do all of the contacts have some level of previous engagement with Efficiency Vermont?**

**Given the budget ceiling, are past or current participants of EV programs available as a potential sample or population to research?**

**The proposal reads “For each project area, the contractor may recruit participants using their own contact list or a contact list of utility customers provided by Efficiency Vermont.” Does the contact list provided by Efficiency Vermont include only customers who have participated in an Efficiency Vermont program, or does it include all Vermont residents? Does Efficiency Vermont consider your list to be a representative sample for the purposes of this study? Also, does this list include e-mail addresses or is it predominantly postal addresses?**

VEIC will provide two contact lists for recruitment: Vermont residents who have personally engaged with Efficiency Vermont, and Vermont residents with electrical utility accounts (from which the contractor can remove Efficiency Vermont participants to create a list of individuals who have not personally participated in an Efficiency Vermont program).

- Residential utility customers who have interacted with Efficiency Vermont – The list from which VEIC will pull a sample for the contractor includes approximately 8,000 unique residential contacts who have interacted with Efficiency Vermont in the past 24 months. VEIC will provide the contractor with a sample of that list and can pull additional sample if necessary for

recruitment. Most contacts in this list include email, phone number, and mailing address. Contacts will include basic information on the nature of their engagement with Efficiency Vermont (e.g., communication with contact center, participation in a program, etc.)

- Residential utility customers who have NOT interacted with Efficiency Vermont – The list from which VEIC staff will pull a sample for the contractor includes more than 60,000 unique contacts. VEIC will provide the contractor with a sample of that list and can pull additional sample if necessary for recruitment. Most contacts in this list include email, phone number, and mailing address.

These lists are not in and of themselves considered to be representative of Vermonters. They do not include data from which to make that assessment (e.g., income). The contractor will be responsible for screening participants during recruitment to ensure a sample that is representative of Vermonters in Efficiency Vermont's service territory. Relevant factors to consider for representativeness will include level of income (defined as low, medium, or high based on a single algorithm that includes household income, number of people in household, and county of residence), level of education, and age. The contractor is welcome to weight response data in order to achieve representativeness if appropriate.

**In addition to the VEIC/Efficiency Vermont customer list(s), does VEIC have access to additional Vermont utility customer lists that could be made available for this research? If so, about how many contacts could be made available? Would there be duplication with the Efficiency Vermont list?**

This will be the source for the contact list of people who have not engaged with Efficiency Vermont. This list has approximately 60,000 unique contacts. There may be individuals who are present in both this list and the list of people who have engaged with Efficiency Vermont; the contractor will remove Efficiency Vermont participants from the list intended as a non-participant sample. The non-participant contact list is sufficiently large that this should not provide a sample size issue.

## Questions about research methods

**How important is the quantification of results, as compared to a more in-depth understanding of weatherization experience?**

The primary objective of this project is to understand 1) what type(s) of weatherization support offer (e.g., financing, rebate, etc.) is most appealing to residential Vermont utility customers, and 2) what type(s) of messaging or framing of the approach(es) is most likely to lead to participation. VEIC welcomes proposals using any approach that will clearly address these objectives. Regardless of the specific approach chosen, VEIC expects results that not only indicate which approach(es) and framing(s) is most likely to lead to participation, but also what it is about that approach(es) that drives that relatively high level of impact.



**Efficiency Vermont has a history of offering weatherization programs. Does VEIC have existing/past research on previous weatherization marketing efforts or best practice research of similar efforts outside of Vermont?**

VEIC can provide the contractor with results from a 2017 survey of Vermont homeowners who completed a relatively large weatherization project (focus of research was on what non-energy benefits were experienced and attributed to the project by homeowners) and a 2014 qualitative study of low-income Vermonters that included experience with and attitudes toward weatherization. VEIC may have additional data from primary research in which weatherization was not the focus but did emerge as a topic of interest to respondents.

### Questions about results

**Will the research be used to generate "offers and messages" for testing or will the research be used to evaluate potential "offers and messages" or is this a potential two-stage process?**

VEIC has a list of preliminary offers and messages to test. After the project kick-off meeting the contractor would be welcome to propose additional offers or messages to test. The contractor would also be welcome to propose minor modifications to the existing list of offers and messages if doing so would improve experimental design.

### Questions about proposal formatting

**Should bios, resumes and corporate qualifications be considered as part of the 15-page proposal, or should they be provided separately as an appendix (and therefore not counting within the 15 page limit for the proposal)?**

Please limit the proposal to 15 pages total including bios, resumes, and corporate qualifications. Individual contractors are welcome to request an exemption from this page limit if they are unable to describe their proposed approach and qualifications within that page limit by emailing Nick Neverisky, VEIC Consumer Insights Manager, at [nneverisky@veic.org](mailto:nneverisky@veic.org).