

RFP – Research Services

Questions & Responses

#	Question	Response
1	We would like to better understand what Task #5 Customer Surveys (Attachment A – Page 5) would include — e.g., how many studies, topline vs. full report, and how big would each study be?	CPA anticipates up to four customer satisfaction surveys, net performer scores, and implementation and analysis of individual programs.
2	Can CPA share their previous segmentation?	CPA will conduct a technical briefing with the selected Proposer.
3	What is the impetus for a new segmentation?	CPA will conduct a technical briefing with the selected Proposer.
4	Does CPA intend for the segmentation to be conducted among a new audience of respondents or utilizing existing data sources? If among a new sample audience, what are the sample size requirements or minimums (including target demographic specifics)?	CPA intend for the segmentation to be conducted using existing data sources plus six new communities.
5	Are there sample size requirements or minimums required for any of the desired methodologies or reporting?	CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
6	"Synthesis" is mentioned in the Solicitation; what prior data and insights is CPA seeking to have synthesized?	CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
7	Scope of Work, Task #2, Item 2: "...informed by the previous year's tracker" Can you provide a copy of last years tracker questionnaire? What company conducted the survey? What data collection method was used for the survey, i.e. was it using online panel, a CPA member list using email, phone, mail, or some other method? What was the final sample size?	CPA will conduct a technical briefing with the selected Proposer.

8	<p>Scope of Work, Task #2, Item 3.1: "Field the survey across all customer segments with sufficient sample sizes..."</p> <p>How many customer segments will need to be addressed with a "sufficient sample size" and how large are the segments?</p> <p>How many regions will need to be covered and how large are the regions?</p> <p>What other "key variables" will need to be covered with a large enough sample size?</p>	<p>CPA's member agencies are set forth in Attachment C of the RFP. CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer. Please review RFP Attachment A – Scope of Services for additional details.</p>
9	<p>Scope of Work, Task #3: "...targeted to CPA customers who are currently enrolled in or have recently transitioned to the TOU-Smart rate."</p> <p>How many customers are currently enrolled or have recently transitioned to the rate plan?</p> <p>What contact information is available for these customers?</p>	<p>Final enrollment numbers are not yet known. CPA will have customer contact information.</p>
10	<p>Scope of Work, Task #5:</p> <p>How should we price this section? Should we recommend a sample size and price a hypothetical survey?</p>	<p>Proposers should provide pricing in the format that follows the requirements of RFP Section 5 (Pricing).</p>
11	<p>Is there a pricing form you'd like us to use, or should we create our own?</p>	<p>Please see CPA's response to Question 10.</p>
12	<p>We are a newly established consulting firm. While our staff members meet the experience requirements outlined in the RFP, their relevant experience was gained through prior employment, not under our current firm. Can this experience be used to demonstrate our firm's qualifications, or must the required experience be demonstrated solely through projects completed by our firm?</p>	<p>Please review RFP Section 7.1.2 (Proposal Requirements) for further details.</p>
13	<p>Does CPA have preferred software(s) of choice for completion of this project? Specifically:</p> <p>Preferred survey software (e.g., Qualtrics, Alchemer, etc.)</p> <p>Preferred statistical analysis software (e.g., R, SAS, Excel, etc.)</p>	<p>CPA will conduct a technical briefing with the selected Proposer.</p>
14	<p>Can CPA provide bidders with any prior customer segmentation reports/studies completed?</p>	<p>CPA will provide existing data and insights to the selected Proposer.</p>

15	Is there an incumbent vendor or current contractor providing services similar to those described in the RFP?	No.
16	For the qualifications criteria, how will CPA weigh direct consumer utility experience compared to a strong public sector research and evaluation track record, particularly in the regions specified in the RFP?	Please review RFP Section 3 (Qualifications and Experience) for details regarding the minimum qualifications and experience.
17	Is there any additional information about how the previous segmentation study was conducted or how the segmentation was created? Can you share the name of the incumbent for this work, if there is one? (In response to Attachment A, Task 1, first paragraph that discusses “updating” and “refreshing” the previous study.)	CPA will conduct a technical briefing with the selected Proposer.
18	For scoping purposes, can you confirm that the brand tracking study is only among CPA customers, and there is no interest in tracking this across the broader population of potential customers across the service territory? (In response to Attachment A, Task 2, first paragraph – “Task #2 focuses on the design and execution of a rigorous brand tracking study to measure CPA’s brand awareness, perception, and trust among residential and commercial customers across its diverse service territory.”)	Correct.
19	Will CPA be providing access to a customer list to assist with research outreach and recruitment? If so, what types of contact data are on the list (address, phone, email, etc.)? (This question is in response to the research tasks outlined in Attachment A in general, not in response to any particular language.)	CPA will provide customer information to the selected Proposer.
20	For pricing purposes, is the anticipated budget (\$310,000) inclusive of the optional task (Task 5)? (This question is in response to information in section 5.3)	CPA’s budget for all Services during the Initial Term is anticipated to be \$310,000, including of the optional task.
21	Is the \$310,000 budget all-inclusive for tasks 1-4?	Please see CPA’s response to Question 20.

22	For studies which we recommend including qualitative research, are online/virtual focus groups acceptable or do you prefer in-person focus groups? If in person, please let us know a preferred city/location.	CPA will make that determination depending on the Proposal and selected Proposer's recommendation. Virtual focus groups are acceptable.
23	Task #1: Segmentation Research Would you like two separate segmentation studies, one for business customers and one for residential customers, or will business and residential be combined?	CPA anticipates they will be separate unless the selected Proposer advises differently.
24	Task #1: Segmentation Research Have segmentations been previously developed? If so, can you share the surveys/data/reports for reference?	Yes, CPA will conduct a technical briefing with the selected Proposer.
25	Task #1: Segmentation Research Is customer sample available? If so, how many records (approx.)? and what contact fields (street addresses, phone, email, etc.)	Yes, CPA will conduct a technical briefing with the selected Proposer.
26	Task #1: Segmentation Research Will the quantitative research need to be conducted via phone and online, or can it done all online?	CPA expects the selected Proposer to make a recommendation.
27	Task #1: Segmentation Research Which format would the data need to be provided (CSV, Excel, SPSS)?	CPA will conduct a technical briefing with the selected Proposer.
28	Task #1: Segmentation Research Deliverables (2) – Does “data dictionary” mean the variable labels for the data? If not, can you please clarify what that is?	Yes.
29	Task #2: Brand Tracker How frequently will the tracking study be conducted?	Annually.
30	Task #2: Brand Tracker Section 2.1 references last year's survey questions – has a tracking study been previously conducted? If so, can you share the surveys/data/reports for reference?	CPA will provide past studies and technical briefs to the selected Proposer.

31	Task #2: Brand Tracker Is customer sample available? If so, how many records (approx.)? and what contact fields (street addresses, phone, email, etc.)	CPA will conduct a technical briefing with the selected Proposer.
32	Task #2: Brand Tracker Are any specific quotas expected (region, language, etc.)?	It should cover CPA's territories as well as the three languages specified in the RFP.
33	Task #3: Customer Survey: Time-of-Use – Smart Rate Is customer sample available? If so, how many records (approx.)? and what contact fields (street addresses, phone, email, etc.)	CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
34	Task #3: Customer Survey: Time-of-Use – Smart Rate Can this be done all online, or would you like it to be mixed phone/online?	Online is acceptable.
35	Task #3: Customer Survey: Time-of-Use – Smart Rate Are any specific quotas expected (region, language, etc.)?	CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
36	Task #3: Customer Survey: Time-of-Use – Smart Rate Timeline: can we assume Recruitment strategy and final survey questionnaire is due by the end of April 2026 (not 2025)?	Yes.
37	Task #4: Customer Survey Attitudes Toward Demand Response Are any customer lists available? If so, how many records (approx.)?	Yes. CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
38	Task #4: Customer Survey Attitudes Toward Demand Response Can this be done all online, or would you like it to be mixed phone/online?	Yes, although Proposers are expected to provide their recommendations.
39	Task #4: Customer Survey Attitudes Toward Demand Response Are any specific quotas expected (region, language, etc.)?	CPA will provide a comprehensive brief containing specific data and insight details to the selected Proposer.
40	Given the limited time between RFP release and the Q&A deadline, would the Clean Power Alliance be amenable to extending the Q&A deadline to Monday, July 7? This would enable potential bidders additional time to thoroughly review and understand the RFP, allowing CPA to ultimately receive stronger, more clearly defined bids.	Not at this time.

41	<p>Page 2 of the RFP indicates a budget of \$310,000. Is this budget intended to cover all five tasks outlined in the Scope of Services or will additional funding be provided?</p> <p>If the budget of \$310,000 is intended to cover all five tasks, would CPA be open to receiving bids with higher pricing that aligns with the full scope? Alternatively, would CPA be open to receiving bids that propose a reduced scope which aligns with the given budget?</p>	Please see CPA's response to Question 20.
42	<p>Section of RFP: Section 7.1 Proposal Requirements – Proposals shall include the following components:</p> <p>7.1.1 A comprehensive portfolio demonstrating the Proposer's expertise in conducting qualitative and quantitative research projects. This many include examples of . . .</p> <p>Question: Is there a minimum number of case studies to include or any requirement for how recent?</p>	Proposers should determine the number of case studies required to illustrate their expertise.
43	<p>Section of RFP: Section 7.1 Proposal Requirements – Proposals shall include the following components:</p> <p>7.1.1 A comprehensive portfolio demonstrating the Proposer's expertise in conducting qualitative and quantitative research projects. This many include examples of . . .</p> <p>Question: Does the term "examples" refer to sample deliverables, or to case study write ups?</p>	Proposers should determine the content of case studies required to illustrate their expertise.
44	<p>Task #1: Segmentation Research – This refreshed research effort will build on previous segmentation work to reflevty current customer attitudes and trends.</p> <p>Question: Does CPA want to maintain the same overall segmentation scheme or is this new research meant to discover if there is a better fit segmentation for the current customer base?</p>	CPA will conduct a technical briefing with the selected Proposer.
45	<p>Task #1: Segmentation Research – This refreshed research effort will build on previous segmentation work to reflevty current customer attitudes and trends.</p> <p>Question: Has CPA developed personas in the past?</p>	Yes, CPA will conduct a technical briefing with the selected Proposer.

46	<p>Task #1 1. Analyze qualitative and quantitative segmentation data to develop detailed customer personas for residential and commercial customers.</p> <p>Question: Is the requirement that the Contractor design and implement research from scratch or will CPA provide any existing data?</p>	CPA will provide existing data and insights to the selected Proposer.
47	<p>Task #1 1. Analyze qualitative and quantitative segmentation data to develop detailed customer personas for residential and commercial customers.</p> <p>Question: Will CPA supply a customer list for use in conducting a survey or recruiting for qualitative research? If so, how many contacts are on that list and how many would have emails?</p>	Yes, CPA will conduct a technical briefing with the selected Proposer.
48	<p>Task #1 1. Analyze qualitative and quantitative segmentation data to develop detailed customer personas for residential and commercial customers.</p> <p>Question: For surveys does CPA have any restrictions on providing incentives to survey respondents?</p>	Yes, CPA does have restrictions on incentives, which will be discussed with the selected Proposer.
49	<p>Task #1 1. Analyze qualitative and quantitative segmentation data to develop detailed customer personas for residential and commercial customers.</p> <p>Question: The RFP mentions residential and commercial customers. Do you seek a residential customer segmentation and a commercial customer segmentation, so two studies and two segmentation schemes/sets of personas?</p>	Correct, please review RFP Attachment A – Scope of Services Task 1.
50	<p>Task #1 Anticipated Deliverables, 3. Executive summary emphasizing strategic implications for CPA brand, programs and rate options</p> <p>Question: Will CPA provide background information on current brand strategies, program offerings and rate plans to enable the Contractor to link segmentation results to strategies?</p>	CPA will conduct a technical briefing with the selected Proposer.

51	Task #2 Brand Tracker. 3.1 Survey fielding, data analysis and reporting – Field the survey across all customer segments with sufficient sample sizes to allow for statistically significant analysis by customer type, region and other key variables Question: Are the customer segments referenced the segments resulting from the Task #1 Segmentation Research?	Yes and CPA will conduct a technical briefing with the selected Proposer.
52	Task #3 Customer Survey_ Tien of Use – Smart rate participants Question: Please confirm that CPA will provide the list of those enrolled in the TOU-smart rate program. What is the size of this customer population? How many would have emails?	CPA will conduct a technical briefing with the selected Proposer.
53	Task #3 Customer Survey_ Tien of Use – Smart rate participants Question: Some of the objectives such as assessing clarity and effectiveness of communications lend themselves to qualitative research. Is CPA open to that?	CPA expects that Proposers will provide a recommended approach.
54	Section 5: Pricing Question: Is there a particular format to provide pricing?	Please see CPA's response to Question 10.