



comEdSM
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Energy Efficiency

Request for Proposals

Heat Pump Quality Installation Adder | Industry Scan, Market
Actor Research, and Lab Testing

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Issued By

ILLUME Advising, LLC on behalf of Commonwealth Edison Company

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Part 1: Overview of Request for Proposals

Purpose

The purpose of this RFP is to engage a research partner to explore opportunities and strategies for ComEd to claim additional savings from residential heat pump (HP) quality installation (QI) practices.

Overview

Commonwealth Edison Company (ComEd) seeks proposal submissions for research into residential HP QI practices. This research would involve three core components. First, an industry scan to understand typical components of HP QI protocols and the opportunities and strategies for integrating HP QI practices into ComEd's program offerings and unlocking additional savings. Second, ComEd wants submitted proposals to include research with key market actors (e.g., installers, distributors, and manufacturers) to characterize current HP installation practices (i.e., establish a quality installation baseline), understand any barriers or challenges that may prevent installers from following quality installation practices or components of QI protocols, and identify strategies for ComEd to support installers in overcoming those challenges. Third, this research should include lab testing equipment to understand the relative importance of different aspects of QI practices and the potential for savings from improved installation practices in ComEd's service territory. Learnings from the lab testing could inform an update to the [Illinois Technical Reference Manual](#) (IL TRM).

ComEd currently has a midstream heat pump rebate program – [Home Heating & Cooling Discounts](#). Only ComEd heat pump-trained contractors are eligible for the rebate. In order to become a [heat pump-trained contractor](#), a portion of the company's sales and installation staff must complete four ComEd-produced on-demand trainings and at least one manufacturer training.

For measure 5.3.1 Air Source Heat Pumps (Centrally Ducted, Ductless and Portable), the IL TRM includes a discussion of Quality Installation in the measure description and the savings algorithms include "Derating" factors that incorporate QI into the savings.

Objectives

The following are the primary objectives of this research.

- Understand, through lab testing, the relative importance of different aspects of QI practices.
- Understand typical components of HP QI protocols and the opportunities and strategies for ComEd to integrate HP QI practices into program offerings.

- Understand current HP installation practices within ComEd's territory (i.e., establish a quality installation baseline) and the potential for savings from improved installation practices in ComEd's service territory.
- Understand any barriers or challenges that contractors installing HPs within ComEd's territory may experience when following HP QI protocols or components of QI protocols.
- Identify strategies, resources, and/or tools for ComEd to help overcome the barriers and challenges to broad use of HP QI practices.

Intent to Bid

Interested entities must confirm their intent to bid through the form linked on the RFP webpage by February 14 along with any questions about the RFP.

ComEd strongly encourages interested vendors to allow their name to be released to facilitate collaboration as we recognize many vendors may want to consider partnering with another organization to assist with the research and reporting aspects of the RFP. Please indicate in your **intent to bid** whether your organization is interested in having its name released by ComEd for potential partnership on the RFP.

Entities who plan to submit a written proposal must follow the format outlined in Part 2 of this RFP.

Project Budget, Timeline, and Phases

The anticipated project kickoff is May 2025. The expected project end date is December 31, 2025. About \$300,000 has been allocated for this research. Approximately, \$100,000 has been anticipated for the industry scan and market actor research (including any associated reporting for these tasks), and the remaining \$200,000 for the lab testing (including associated analysis and reporting for this task).

Final decisions on whether to pursue the lab testing will be determined prior to beginning that task. The decision will be based on the industry scan and market actor interview findings, which will inform whether the lab testing task is pursued, and if so, its scope.

Key Deliverables

The key deliverable for this project will be a final report written using the ComEd Customer Innovation report template. The report should describe the data sources, sample frames, analysis and research performed, key results, as well as recommendations for ComEd. Final reports are typically about 50-75 pages.

Potential Tasks

Respondents to the proposal should provide details of their proposed tasks to execute this research effort. We provide example tasks below for consideration.

Task 1: Project Management. Contractor is responsible for managing the project to the contracted scope, budget, and timeline. Any changes or areas of concern should be identified as early as possible and raised to ILLUME and ComEd immediately for discussion. Timeline should include expected draft and final deliverable due dates, with at least one two-week period for ComEd's review for each deliverable. In addition, the timeline must account for a two-week marketing review period for all final reports, which must occur prior to the contract end date.

Task 2: Kickoff Meeting. Contractor will schedule and host a kickoff meeting with ILLUME, ComEd, and any other relevant partners to discuss project administration, expectations, the project implementation plan, and a detailed task-level timeline.

Deliverables: Contractor to send kickoff presentation slides prior to the meeting.

Task 3: Check-in Meetings and Progress Updates. Contractor to schedule and lead regular check-in meetings with ILLUME and ComEd at a cadence agreed upon with the team. Contractor to share progress status updates (comparing progress against the scope for clarity) during meetings. Frequency and format of these status updates should be discussed and agreed upon with ILLUME and ComEd during the kickoff meeting.

Deliverables: Contractor to create and send out meeting agendas at least 24 hours prior to the meeting, take notes during the meeting that are made available to all attendees, and send a list of action items with due dates following each meeting.

Task 4: Research/Project Implementation Plan. Contractor to create and deliver a research or project implementation plan. The plan should outline the specific research objectives and detailed tasks. This plan may include the following:

- Preliminary list of HP QI protocols to investigate and benchmark against the Illinois TRM's current derating.
- Preliminary list of utility HP programs with HP QI components to investigate and benchmark against ComEd's approach.
- Description of methodology for completing market actor interviews.
- Description of methodology for lab testing certain QI protocols on equipment.

Deliverables: Contractor to share a draft of the plan with ILLUME and ComEd for review and input before finalizing the plan.

Task 5: Secondary research and analysis. Contractor will conduct market scan as defined in the research plan, which may include secondary literature, local codes, utility programs, and TRMs to understand typical components of HP QI protocols, as well as the opportunities and strategies for integrating HP QI into ComEd program offerings in order to unlock additional savings. Contractor will conduct analysis to apply learnings to ComEd's context.

Deliverables: Contractor will include these results in the final deliverables.

Task 6: Market actor research. Contractor will conduct research with key market actors as defined in the research plan, such as installers, distributors, and manufacturers to characterize current HP installation practices (i.e., establish a quality installation baseline) and understand any barriers or challenges that may prevent installers from following quality installation practices. These research activities should also explore market actors' perspectives on various strategies and/or tools (identified through Task 5) that could support installers in overcoming installation challenges. Lastly, the market actor research should characterize how often heat pumps are recommended by installers and ultimately installed within ComEd's territory.

Deliverables: Contractor to share a draft data collection tool(s) with ILLUME and ComEd for review and input before finalizing. Contractor to share final data collection tool(s). Contractor to deliver an interim presentation that summarizes key findings and inform whether to pursue lab testing. Contractor will include these results in the final deliverables.

[Tentative Task] Task 6: HP QI Lab Testing. Contractor will test HP QI protocols on equipment as defined in the research plan, such as in a lab to understand the relative importance of different aspects of QI practices and the potential for savings from improved installation practices in ComEd's service territory.

Deliverables: Contractor will include these results in the final deliverables.

Task 7: Final Report and Presentation. Contractor to create and deliver a final report summarizing the project findings and recommendations using the ComEd final report template provided. Both the final report and presentation should outline clear and actionable recommendations for ComEd, as well as summarize the key tasks, methodologies, and findings. Contractor will schedule and host a final presentation at the close of the project with ILLUME, ComEd, and any relevant stakeholders. A final report and presentation will be delivered regardless of whether the lab testing task occurs.

If needed, and as defined in the research plan, the contractor will also support ComEd in submitting a proposed revision to the Illinois TRM based on the results from this research.

Deliverables: Contractor will prepare a final report using the ComEd Customer Innovation report template. The report should describe the data sources, sample frames, analysis and research performed, key results, as well as recommendations for ComEd. Contractor to send the final presentation slides prior to the meeting. If needed, contractor will support ComEd through the process of submitting an update to the IL TRM.

Submittal and Review Process

Submittal Schedule. Submissions will be accepted until 11:59 pm CT on March 14, 2025. It is the sole responsibility of respondents to ensure their submission is sent to Customer.Innovation@ComEd.com before the due date and time. Please be sure to include the name "Heat Pump Quality Installation Adder RFP" in the subject line of your email.

Point of Contact. For any questions or concerns regarding this solicitation, please submit through the form provided on the Customer Innovation RFP webpage along with your intent to bid. All questions submitted by February 14th will be responded to by February 28th.

Review Process. ComEd staff and consultants will review submissions and may follow up with respondents by phone to gain clarification as needed.

Event Schedule

ComEd expects to follow the selection process according to the schedule below:

RFP issued by ComEd	February 7, 2025
Intent to bid due	11:59 pm CT on February 14, 2025
Deadline to submit questions	11:59 pm CT on February 14, 2025
Deadline to indicate interest in having organization name released by ComEd for potential partnership on RFP	11:59 pm CT on February 14, 2025
ComEd releases names of vendors interested in potential partnership on RFP	11:59 pm CT on February 17, 2025
ComEd posts responses to questions	11:59 pm CT on February 28, 2025

RFP submissions deadline	11:59 pm CT on March 14, 2025
Respondents will be notified of next steps after ComEd has reviewed submissions	April 4, 2025

Additional Details

Submissions are limited to six pages total for Organization Overview and Scope.

Submissions should use simple language with minimal jargon and avoid the use of elaborate marketing material beyond that necessary to provide a complete, accurate, and reliable submission.

Submissions should be valid for 60 days.

Confidential material: All the submissions will become the property of ComEd. Submitting entities should not include proprietary or confidential information in their submission, unless required to clearly convey the proposed technology solution. Financial, commercial or technical information that is considered confidential should be clearly indicated in the submission.

Note: ILLUME Advising is the Administrator for the ComEd Customer Innovation initiative. ILLUME's primary responsibility is subcontracting to organizations selected to run pilots. Terms and Conditions for subcontracts are provided by request.

Part 2: Required Format for State of Qualifications

Organizational Overview

Include as part of your three-page submission:

- Provide your organization name, relevant location(s), parent organizations and organization type.
- Summarize your relevant reputation and experience related to the RFP topic.
- Provide an organizational chart with names, titles, certifications and professional licensing.

Project History

Include as a Microsoft Excel file (does not count towards your three-page limit). Provide a table of relevant studies/projects executed by your organization or key members of your organization within the past five years using the guidance table below. For project timeline, include information such as contract signed, launching date, monitoring period, and final reporting date as applicable/available.

Project Name	Summary of Work/ Role of Organization	Client/ Participant/ Customer	Building/Site Location (City, State)	Technology Vendor(s)	Project Timeline	Project Highlights/ Benefits Received

Scope

Include as part of your three-page submission. Based on the project guidelines above, provide a description of your proposed strategy to fulfill the RFP. Summarize the approach for each phase of development with an estimated timeline and budget, assuming a budget based on time and materials. Bidders may recommend any set of activities designed to meet the project objectives defined above.

Supplemental Information

Include as Appendix material and not part of your three-page submission. Please provide only relevant supplemental information that will help reviewers clarify your qualifications that are very specific to this RFP and refrain from including any extraneous sales material or attachments. ComEd will review what is deemed relevant. Note that including items in the Appendix does not ensure review.