



Energy Efficiency

Request for Proposals

Heat Pump as AC Replacement Equipment Compatibility and Modulation Research

Issue Date

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Issued By

The BrightLine Group, on behalf of Commonwealth Edison Company

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Part 1: Overview of Request for Proposals

Overview

The Brightline Group, on behalf of ComEd Customer Innovation, is seeking proposal submissions for research into the combination of equipment and thermostat control settings in partial electrification scenarios that result in proper heat pump (HP) modulation and increased efficiency. This research should provide ComEd with results and recommendations that can improve program design, as well as outline updated guidance for ComEd trade allies to ensure optimal HP performance in residential air conditioning (AC)-replacement scenarios (e.g., which thermostat settings on which pieces of equipment will enable modulation on inverter-driven HP).

A HP as AC replacement scenario is one where a customer has a working natural gas furnace and air handler unit (AHU), but replaces their AC with a HP. In this scenario, the HP provides both heating and cooling, and the furnace is available for back up heat when needed (e.g., during times when the outdoor temperature falls below a certain point or when the HP takes too long to reach the setpoint).

Installing HP in AC-replacement scenarios can potentially provide a variety of benefits, such as low incremental installation costs, load flexibility, reduced carbon emissions, and dynamic-control for improved customer bill impacts. Distributors in Illinois currently offer several inverter-driven residential HP models that are well suited for this scenario. Being inverter-driven, these HP models have the potential to modulate to increase efficiency and performance throughout the year when set up with the proper controls. However, if not properly set up, it is possible that even inverter-driven HP in this scenario can essentially operate like single-speed HP, and thus, yield less than optimal efficiency and performance.

The BrightLine Group, E Source, and Swift Strategy team is the Administrator for the ComEd Customer Innovation initiative (Customer Innovation Admin team). BrightLine is the Prime contractor. As BrightLine's subcontractor, E Source's primary responsibility is subcontracting to organizations selected to run pilots. Accordingly, E Source, on behalf of BrightLine and ComEd, will hold the contract with the selected vendor. Terms and Conditions for subcontracts are provided by request.

Objectives

The following are the primary objectives of this research:

- Develop standardized settings to enhance HP performance when the motivation is HP-as-AC replacement.
- Outline best practices for quality installation of HP-as-AC replacement, including quantifying the energy and non-energy benefits, in ComEd program(s).
- Summarize best practices for integrating and implementing research findings into ComEd program(s).

Intent to Bid

If your organization is interested in bidding on this RFP, please email

CustomerInnovation@BrightLineGroup.com by **11:59 pm CT on February 16, 2026**, the

following:

- Any questions about the RFP or process;
- Whether your organization wants its name released to other vendors to facilitate potential partnerships on this RFP; and
- Your organization's intent to bid.

In the email subject line, please include 1) your organization's name, and 2) the title of the RFP. The deadline for submitting an intent to bid is **February 16, 2026**.

ComEd strongly encourages that interested vendors allow their organization's name to be released to facilitate potential partnerships on this 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 April 2026. The expected project end date of Phase 1 is August 2026. About \$80,000 - \$100,000 has been allocated for Phase 1 of this research. Vendors should also provide an estimated budget for the Phase 2 research and justification for that budget. Vendors should present a realistic budget and timeline that aligns with their proposed tasks for addressing the research objectives.

Key Deliverables

The key deliverables for this project are outlined below. We separate the deliverables into two phases, where ComEd approval is required before proceeding to the second phase.

Phase 1: Background Research

The key deliverables for Phase 1: Background Research include the following:

- Draft and final list of HP, thermostat, AHU combinations to include in further research.
- Draft and final report slide deck written using the ComEd Customer Innovation template summarizing manufacturer resources on this topic that are available to trade allies, as well as additional context on this topic from manufacturers.
- Compile industry leading perspective and recommendations for how contractors can install HP-as-AC replacement and ensure the HP is operating as efficiently as it can across key HP and thermostat manufacturers (i.e., making sure it acts like a variable speed HP with modulation rather than a single speed HP)
- Draft and final preliminary HP-as-AC Replacement Setting Guidance memo written using the ComEd Customer Innovation template documenting equipment compatibility and equipment settings (and conditions under which they apply) that enable high HP performance in this scenario.
- Draft and final lab testing plan written using the ComEd Customer Innovation template that outlines how lab testing can fill any gaps or confirm the manufacturer training material on the combination of HP, thermostat settings, thermostat type, and AHU that delivers HP modulation and high HP performance and efficiency in AC-replacement scenarios.

Phase 2: Lab Testing

The key deliverables for Phase 2: Lab Testing include the following:

- 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 and potential contractor training topics/methods. Final reports are typically about 50-75 pages.
- Draft and final validated HP-as-AC Setting Guidance memo written using the ComEd Customer Innovation template documenting equipment compatibility and equipment settings and conditions under which they apply) that enable high HP performance in this scenario.

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. We separate the tasks into two phases, where ComEd approval is required before proceeding to the next phase.

Phase 1: Background Research

Task 1: Top HP, Thermostat, AHU Combinations

Vendor to identify and recommend the top HP, thermostat, AHU combinations to include in subsequent research. This list should cover a range of manufacturers. Vendor should develop reasoning for their recommendations and may plan to use program data on commonly rebated residential HP in ComEd's service territory, ResStock, publicly available information on equipment performance or functionality (e.g., demand response compatibility), and other available data and work experience to develop their recommendations. Vendor to gather and address feedback from ComEd on the Vendor's recommendations.

Deliverables: draft and final list of HP, thermostat, AHU combinations to include in further research.

Task 2: Manufacturer Research

Vendor to conduct research with the relevant manufacturers from Task 1 to understand the extent to which (a) they're aware of this issue, (b) they cover this topic in their trainings or provide support on this topic for installers (e.g., through their sales representatives), and (c) they have insight on the performance of HP-as-AC-replacement installs in the field from their connected systems.

Vendor to begin this research by developing a research plan that covers:

- Whether the Vendor will interview manufacturers, and if so, which ones and with what questions?
- Whether the Vendor will review manufacturer training materials or attend manufacturer trainings, and if so, which ones?

Once ComEd approves the research plan, the Vendor will conduct the research accordingly and document their findings and recommendations in a report slide deck. The Vendor's recommendations should be tailored to ComEd's programs and processes and actionable by ComEd to improve outcomes for ComEd customers and programs. For example, recommendations may include adjustments to on-site commissioning or installation protocols.

Vendor to gather and address feedback from ComEd on both the research plan and report slide deck.

Deliverables: draft and final research plan memo; draft and final report slide deck.

Task 3: Preliminary HP-as-AC Setting Guidance

Vendor to begin documenting the settings and conditions trade allies should use when installing HP-as-AC replacement. This documentation may include:

- Compatibility across the combinations of HP, thermostat, furnace, and AHU identified in Task 1

- Specific instructions for thermostat settings that enable HP modulation and high performance in HP-as-AC replacement scenarios (e.g., summer and winter fan speeds, defrost cycle controls, winter settings that allow HP modulation or staging)
- Specific instructions for thermostat settings to avoid that could lead to low HP performance in HP-as-AC replacement scenarios

For Phase 1, the Vendor should frame how this information will be shared and fill in as much guidance as possible.

Vendor to gather and address feedback from ComEd on the deliverable.

Deliverables: draft and final HP-as-AC Setting Guidance memo.

Task 4: Lab Testing Plan

Vendor to develop a lab testing plan to fill any gaps or confirm the manufacturer training material on the combination of HP, thermostat settings, thermostat type, and AHU that delivers HP modulation and high HP performance and efficiency in AC-replacement scenarios.

This lab testing plan should call out the research questions the lab testing will answer, describe the lab testing conditions and iterations, and map how those test results answer the specified research questions.

Vendor to gather and address feedback from ComEd on the lab testing plan.

Deliverables: draft and final lab testing plan.

Phase 2: Lab Testing

Task 1: Conduct Lab Testing

Vendor to conduct lab testing in accordance with the lab testing plan.

Deliverables: *none.*

Task 2: Reporting

Vendor to develop a report that describes the lab testing plan and methodology, research questions to answer, lab testing results, recommendations for further research, and recommendations for ComEd to consider for how to support trade allies installing HP-as-AC-replacement with optimum performance and efficiency. The Vendor's recommendations should be tailored to ComEd's programs and processes and actionable by ComEd to improve outcomes for ComEd customers and programs. For example, recommendations may include adjustments to on-site commissioning or installation protocols.

Vendor to outline a plan for creating materials needed to support trade allies in properly installing HP-as-AC replacement. This plan should recognize the available resources for trade

allies from manufacturers and other sources on this topic and identify how the materials the Contractor proposes to develop fill additional gaps. This plan should also describe the proposed materials, including the format of those materials (e.g., reference documents, training videos, or training events), how they'd be made available to trade allies, how they'd be maintained, and an outline of the content for those materials (e.g., how will the material be presented to make clear which settings lead to optimal HP performance and which will not).

Vendor to gather and address feedback from ComEd on the report.

Deliverables: draft and final report.

Task 3: Validated HP-as-AC Setting Guidance

Vendor to finalize documenting the settings and conditions trade allies should use when installing HP-as-AC replacement. This documentation may include:

- Compatibility across the combinations of HP, thermostat, furnace, and AHU identified in Task 1
- Specific instructions for thermostat settings that enable HP modulation and high performance in HP-as-AC replacement scenarios (e.g., summer and winter fan speeds, defrost cycle controls, winter settings that allow HP modulation or staging)
- Specific instructions for thermostat settings to avoid that could lead to low HP performance in HP-as-AC replacement scenarios

For Phase 2, the Vendor should clearly document the combination of equipment and settings that will lead to high HP performance in a HP-as-AC replacement scenario, where this guidance reflects the findings from lab testing.

Vendor to gather and address feedback from ComEd on the deliverable.

Deliverables: draft and final HP-as-AC Setting Guidance memo.

Submittal and Review Process

Submittal Schedule. Submissions will be accepted until **11:59 pm CT on March 2, 2026**. It is the sole responsibility of respondents to ensure their submission is sent to

CustomerInnovation@BrightLineGroup.com before the due date and time. In the email subject line, please include 1) your organization's name, and 2) the title of the RFP.

Point of Contact. For any questions or concerns regarding this solicitation, please email CustomerInnovation@BrightLineGroup.com, along with your intent to bid. In the email subject line, please include 1) your organization's name, and 2) the title of the RFP.

All questions submitted by **11:59 pm CT on February 16, 2026** will be responded to by 11:59pm CT on February 23, 2026.

Review Process. ComEd staff and the Customer Innovation Admin team will review submissions and may follow up with respondents to gain clarification as needed.

Event Schedule

The Customer Innovation Admin team and ComEd plan to follow the schedule outlined below for this RFP.

RFP Activity	Date
RFP issued by BrightLine, on behalf of ComEd	February 9, 2026
Intent to bid due	11:59 pm CT on February 16, 2026
Deadline to submit questions	11:59 pm CT on February 16, 2026
Deadline to indicate interest in having the organization name released by ComEd for a potential partnership on the RFP	11:59 pm CT on February 16, 2026
BrightLine, on behalf of ComEd, releases names of vendors interested in potential partnership on RFP	11:59 pm CT on February 18, 2026
BrightLine, on behalf of ComEd, posts responses to questions	11:59 pm CT on February 23, 2026
RFP submissions deadline	11:59 pm CT on March 2, 2026
Respondents will be notified of the next steps after ComEd and the Customer Innovation Admin Team have reviewed submissions	March 16, 2026

Additional Details

Submissions are limited to 10 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.



Energy Efficiency

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: The BrightLine Group, E Source, and Swift Strategy team is the Administrator for the ComEd Customer Innovation initiative. BrightLine is the Prime contractor (Customer Innovation Admin team). As BrightLine's subcontractor, E Source's primary responsibility is subcontracting to organizations selected to run pilots. Accordingly, E Source, on behalf of BrightLine and ComEd, will hold the contract with the selected vendor. Terms and Conditions for subcontracts are provided by request.

Part 2: Required Format for Proposals

Organizational Overview

Include as part of your 10-page submission the following information about the project team (prime and subcontractors):

- 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 10-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	Client/Participant	Location (City, State)	Brief Project Summary	Project Timeline	Project Highlights
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Scope

Include as part of your 10-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 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.

Include as part of your 10-page submission. Details about the requests (e.g., contact information, program data) and support (e.g., recruitment, interview coordination) that your project team might request from ComEd and/or the Customer Innovation Admin team in order to successfully deliver your proposed scope. Please indicate the priority of these potential requests/support. In addition, describe how your team will adapt if ComEd or the Customer Innovation Admin team cannot support some or all these requests.

Include as part of your 10-page submission. Provide a table (example below) that indicates which proposed activities will help address the core research objectives and questions.

Task	Research	Research	Research
	Objective/Question #1	Objective/Question #2	Objective/Question #3
Task 1			
Task 2			
Task 3			

Supplemental Information

Include as Appendix material and not part of your 10-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: Including items in the Appendix does not ensure review.