

# Request for Proposals

Market Transformation Concept Development

## 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 a potentially two-phase research project that will explore the viability of delivering savings via a Market Transformation Initiative (MTI) for multiple measures, including efficient roof top units (RTUs) and unitary heat pump water heaters (HPWH).

During the first phase, the selected vendor will conduct initial viability screening for several measures and assess a) how successful these measures might be if included in an MTI and b) for measures that are MTI viable, develop a Market Transformation concept plan for ComEd to review and approve before advancing into a second phase. Phase 1 includes the development, vetting, and approval of up to four MTI concepts focused on several technologies of interest. At a minimum, Phase 1 will develop MTI concepts for RTUs and HPWHs. After developing MTI concepts for RTUs and HPWHs, ComEd may choose to ask the selected vendor to develop MTI concepts for up to two additional technologies.

The first phase of work will require primary and secondary data collection to determine if it makes sense to develop full-scale MTIs, as outlined by the Illinois Stakeholder Advisory Group (IL SAG), for the identified technologies. See IL SAG resources below for more information:

- [Illinois Statewide Technical Reference Manual \(TRM\) – Volume 4, Attachment C: Framework for Counting Market Transformation Savings in Illinois](#)
- The [Market Transformation Savings Protocol Process Recommendation](#) document provides a comprehensive MT initiative development process.

Submissions should focus on delivering the first phase of research. Depending on the outcomes of Phase 1, ComEd may fund a second phase of this work. If approved by ComEd, the second phase of work will develop a full MTI Business Plan (see [IL TRM Attachment C](#) for more details) for each technology with a viable concept plan. Each MTI Business Plan would then be presented to the IL SAG for approval as an MTI pilot program. Based on the outcomes of Phases 1 and 2, there could also be a potential third phase: implementation of the designed MTI pilots. In which case, the selected vendor may be asked to develop a scope of work and then implement the MTI pilot(s).

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

### Phase 1

The primary objective of Phase 1 research is to assist ComEd in MTI planning and decision making by developing MT concepts that assess the viability, savings potential, and costs for multiple measures (e.g., RTUs and HPWHs). To meet this objective the bidder should:

- Design a preliminary program theory and logic model (PTLM) for each of the targeted technologies, beginning with unitary HPWH and efficient RTUs. This includes an outline of the market interventions, as well as the near- mid- and long-term market progress indicators for each technology.
- Develop a high-level framework for an MT program that could achieve the outcomes established in the PTLM for each technology. This includes working with the ComEd planning team to determine how the MT programs would interconnect with and attribute savings between MT and Resource Acquisition (RA) efforts for overlapping technologies.

### Phase 2

If approved by ComEd, the second phase of work will develop a full MTI Business Plan (see [IL TRM Attachment C](#) for more details) for each technology with a viable concept plan. Each MTI Business Plan would then be presented to the IL SAG for approval as an MTI pilot program. In Phase 2, the selected vendor would develop the following for each selected technologies:

- Develop a MTI including logic model (LM) and market progress indicators (MPIs)
- Energy Savings Framework (EFS)
- Detailed implementation or business plan
- Support the IL SAG's review and approval process.

ComEd reserves the right to decide which technologies move forward to the second phase. For each technology that ComEd approves to move forward to the second phase, the selected vendor would write a new scope of work detailing their approach and associated budget.

## Project Budget, Timeline, and Phases

The anticipated project kickoff is May 2026. The expected project end date is December 2026. About \$100,000 - \$130,000 has been allocated for this research has been allocated for this first Phase of research. Vendors should present a realistic

budget and timeline that aligns with their proposed tasks for addressing the research objectives.

## Key Deliverables & Outcomes

The key deliverables for this project, at minimum, will be a final presentation and report that synthesize learnings across tasks and comprehensively addresses each research objective. The report and presentation will be created in the ComEd Customer Innovation templates. The report should describe the data sources, sample frames, analysis and research performed, key results, as well as actionable recommendations for ComEd. Final reports are typically about 50-75 pages.

For Phase 1, the vendor will produce the following deliverables using ComEd templates.

- A program theory and logic model for each identified technology – this must be based on an understanding of the market and distribution network and approaches for the targeted technology.
- Identification of key opportunities in the market for the targeted technology to be delivered as an MTI as well as key barriers that would either need to be overcome and/or would prevent the technology from being delivered as an MTI.
- A coordination plan highlighting how the MTI and RA program(s) would run jointly including a plan for savings attribution between MT and RA, should the technology move onto the pilot phase.

If approved by ComEd, the Phase 2 deliverables will include:

- A detailed pilot implementation plan including LM and MPIs and an energy savings framework (EFS).
- An evaluation plan developed in coordination with the ComEd evaluation team.
- Support in moving the MTI(s) through the IL-SAG approval process.

## Required Tasks

Respondents to the proposal should provide details of their proposed tasks to address the main research objectives and deliver the key outcomes. Below are tasks that are required.

**Project Management.** Contractor is responsible for managing the project to the contracted scope, budget, and timeline. Any areas of concern should be identified as early as possible and raised to ComEd and ComEd and the Brightline, E Source, Swift team (Customer Innovation Admin team) immediately for discussion.

**Kick-Off Meeting.** Contractor will schedule and host a kick-off meeting with ComEd, the Customer Innovation team, and any other relevant partners to discuss project administration, expectations, the project implementation plan, and a detailed task-level timeline. Timeline should include expected draft and final deliverable due dates, with at least one two-week review period for ComEd 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.

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

**Check-in Meetings.** Contractor to schedule and lead regular check-in meetings with ComEd and the Customer Innovation Admin team at a cadence agreed upon with the team. Contractor to share progress status updates during meetings (comparing progress against the scope for clarity). Frequency and format of these status updates should be discussed and agreed upon with ComEd and the Customer Innovation Admin team 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.

**Research Implementation Plan.** Contractor to create and deliver a research or implementation plan. The plan should outline the specific research objectives, detailed tasks, and research methods including details about any recruitment efforts and/or approaches to benchmarking.

*Deliverables:* Contractor to share a draft of the plan with ComEd and the Customer Innovation Admin team for review and input before finalizing the plan.

**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. The report should synthesize learnings across all project activities and outline clear, actionable recommendations for ComEd. Contractor to schedule and host a final presentation at the close of the project with ComEd, Customer Innovation Admin team, and any relevant stakeholders. The final presentation will review the project tasks and methodology, key project findings, and present clear and actionable recommendations to ComEd.

*Deliverables:* Contractor shall submit an outline of the report two weeks prior to delivering the draft report. Contractor shall submit a draft final report for review at least 6 weeks prior to the last day of the SOW Term. Contractor to submit a final version of the final report and deliver the final presentation before the end of the SOW Term.

## Phase 1

**Task 1.1:** Contractor will develop an MT concept for each identified technology, starting with unitary HPWHs and efficient RTUs. The contractor should use secondary research and limited primary data collection to develop these concepts.

- Barriers, risks, and opportunities assessment. The contractor must develop a report outlining any key barriers and any key opportunities to the successful implementation of an MTI for each targeted measure. This should address whether barriers can be overcome, how and with what level of effort or investment, and what opportunities provide the most leverage for success in the market.
- Market Scan. Conduct a market scan of the MTI programs run by other program administrators and document progress, challenges, and lessons learned.
- Data Assessment. The contractor must evaluate the reliability and accuracy of available data for developing a future Natural Market Baseline (NMB) and Energy Savings Framework (ESF) should the technologies move forward. If necessary, the contractor should recommend alternative or supplemental data sources. If establishing the NMB would require procuring third-party market data, the contractor should provide a cost estimate for data procurement.
- PTLM Development. The contractor must develop a concept PTLM for each identified technology including market progress indicators to the extent possible for the Phase 1 effort. The purpose of the concept of PTLM is to ensure there is a sound and potentially viable approach to moving the technology forward using an MT framework.
- Estimated savings and cost. The contractor must provide estimated savings and costs for the proposed MTI.

Responses to this RFP should detail, at a minimum, the proposed approach for the following types of research activities:

- Secondary research looking into other MT programs for the targeted technology.
- Secondary research into the market chain/supply chain for the targeted technology to understand where interventions may lead to achievement of MPis.
- Interviews with the ComEd Customer Innovation team, Administrator and RA team to understand current efforts and any nuances related to the ComEd territory.
- Interview with market actors or other program or technology experts.

*Deliverables:* Contractor to share a draft PTLM and the barriers/opportunities memo highlighting any areas of concern or barriers to moving the technology forward as an MTI with ComEd and the Customer Innovation Admin team for review and input.

**Task 1.2:** Contractor will work with ComEd and the Customer Innovation Admin team to develop a plan for how concurrent MT and RA efforts focused on the same technologies can interconnect, increase overall technology adoption, and how savings could be appropriately attributed between the two delivery models.

- Coordination Between MT and RA Programs. The contractor must work closely with the ComEd planning and implementation teams to develop a coordination plan between any future MTI and current RA programs targeting the same technology. As part of this the contractor will work with the teams to a) determine if two concurrent program models are viable and, if so, how adding the MT pilot will advance the market's development and b) co-create a proposal for how to attribute savings between the two program delivery models.
- Evaluator Coordination. The contractor is expected to present the MTI concept to ComEd evaluators, gather and respond to input, and share (as needed) information to evaluators.

*Deliverables:* Contractor to share a draft and final plan for the saving attribution approach and a summary of data considerations with ComEd and the Customer Innovation Admin team for review and input.

**Task 1.3:** Contractor will work with ComEd and the Customer Innovation Admin team to assess the viability of the PTLM and availability of data to create the NMB for each technology. Contractor will develop and present an assessment that details whether or not it makes sense to develop a full MTI business plan for each technology.

*Deliverables:* Contractor to share short memo outlining the justification for a go or no-go decision with ComEd and the Customer Innovation Admin team for review and consideration.

[Stage Gate – Based on the outcomes of Phase 1, ComEd, in consultation with the Customer Innovation Admin team, will decide which technologies, if any, will advance to Phase 2.]

## Phase 2

**Task 2.1:** The contractor will design and conduct a comprehensive market characterization study for the MT target market in ComEd's service territory. The market characterization study should collect necessary data to inform the Natural

Market Baseline (NMB), market size, and market barriers, and to support the development of the MT theory of change and logic model.

Responses to this RFP must describe how existing research and work by other initiatives will get leveraged, identify data needs, and propose relevant data collection strategies. Data collection may include review of existing data, secondary research, and primary research such as market actor interviews. This research should include identifying key market actors (e.g., manufacturers, distributors, contractors, customers), describing sales, distribution, installation, and maintenance channels, and assessing potential barriers to adoption.

Throughout this task, the contractor will share drafts of the study plan, data collection tools (e.g., surveys, interview guides), and interim findings with ComEd and the Customer Innovation Admin team for review and input. The contractor will then deliver a final market characterization study report that documents all methods, data, and findings.

*Deliverables:* Draft and final market characterization study plan, drafts of research tools such as surveys and interview guides, interim findings, and final market characterization report, including research methods, data, and findings.

**Task 2.2:** The contractor will create all components of an Initiative Business Plan, including an Energy Savings Framework (ESF) that aligns with the IL TRM, Attachment C. The Business Plan must include the logic model, MPis, NMB, and unit- and market-level savings projections.

- Energy Savings Framework (ESF). The ESF should clearly define the data requirements necessary to complete an annual impact evaluation. It should clearly define what sales data will be required, where that data comes from, and the protocols for how it will be cleaned. The ESF should describe how per-unit savings will be calculated and how to disaggregate sales between the traditional resource acquisition program and the MT initiative to prevent double-counting. Furthermore, the ESF should outline where sales and market data will come from as well as how they will inform the design of NMB, the Logic model, MPis, and the frequency with which these will be revisited.
- Consensus Building. Contractor should coordinate with and involve evaluators and stakeholders to ensure transparency, alignment, and understanding of the data and methodologies that will be used to estimate savings. Establishing energy savings methods for the MT initiative requires collaboration with multiple parties. Gaining acceptance for the proposed NMB often requires multiple rounds of review and refinement as data and assumptions are vetted by ComEd's evaluator and IL SAG.

- Coordination with Other MT Initiatives. Contractor should assess how the programs and pilots currently offered by other utilities may impact the ComEd service territory. Ideally, aspects of program design, implementation, methodology, and evaluation will be coordinated for Illinois utilities that are offering a similar pilot or program.

*Deliverables:* Energy Savings Framework(s) and MT Initiative Business Plan(s) for IL SAG review.

**Task 2.3:** Contractor will facilitate regular coordination meetings with ComEd's evaluator, ComEd, and the Customer Innovation Admin team to review and build consensus on core components of the MTI. In parallel with the development of the logic model and MPis, the contractor will support ComEd's evaluator in developing the evaluation plan for the MT initiative(s).

*Deliverables:* Meeting agenda, slides, and meeting notes with key takeaways and next steps.

**Task 2.4:** Contractor will participate in meetings with ComEd, ComEd's evaluator, and the Customer Innovation Admin team to prepare the approach for presenting the MTI Business Plan(s) to the IL SAG. The contractor will then attend IL SAG meetings alongside ComEd's evaluator to support the review and approval process.

*Deliverables:* Slide deck and final MTI Business Plan(s)

**Task 2.5:** Contractor will design the MT pilot(s) and develop a deployment plan(s). The deployment plan(s) should include a data collection section with an explanation of the data source to measure impact. If approved by ComEd, deployment of these plan(s) will be piloted through an additional scope of work for the selected contractor.

*Deliverables:* Draft and final pilot plan

**Additional Tasks as needed:** Responses to this RFP should describe any additional tasks recommended to support the research objectives.

## **Intent to Bid**

If your organization is interested in bidding on this RFP, please email [CustomerInnovation@BrightLineGroup.com](mailto:CustomerInnovation@BrightLineGroup.com) by 11:59 pm CT on March 10, 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 **March 10, 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.

## Submittal and Review Process

**Submittal Schedule.** Submissions will be accepted until **11:59 pm CT on March 24, 2026**. It is the sole responsibility of respondents to ensure their submission is sent to [CustomerInnovation@BrightLineGroup.com](mailto: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](mailto: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 March 10, 2026** will be responded to by **11:59pm CT on March 17, 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 BrightLine team and ComEd plan to follow the schedule outlined below for this RFP:

RFP Activity	Date
RFP issued by BrightLine, on behalf of ComEd	March 3, 2026
Intent to bid due	11:59 pm CT on March 10, 2026
Deadline to submit questions	11:59 pm CT on March 10, 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 March 10, 2026

RFP Activity	Date
BrightLine, on behalf of ComEd, releases names of vendors interested in potential partnership on RFP	11:59 pm CT on March 12, 2026
BrightLine, on behalf of ComEd, posts responses to questions	11:59 pm CT on March 17, 2026
RFP submissions deadline	11:59 pm CT on March 24, 2026
Respondents will be notified of the next steps after ComEd and the Customer Innovation Admin team have reviewed submissions	April 7, 2026

## Additional Details

Submissions are limited to 20 pages total for the 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:** The BrightLine Group, E Source, and Swift Strategy team is the Administrator for the ComEd Customer Innovation initiative. 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.

## Part 2: Required Format for Proposals

### Project Team Overview

*Include the following information about the project team, including prime and any subcontractors (does not count towards your 20-page limit):*

- Provide organization name(s), relevant location(s), parent organizations and organization type.
- Summarize 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 20-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 20-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.

*Include as part of your 20-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 20-page submission. Provide a table (example below) that indicates which proposed activities will help address the core research objectives and questions.

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

### Supplemental Information

Include as Appendix material (does not count towards your 20-page limit). 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.