



Energy Efficiency

# Request for Proposals

HVAC Contractor Development Study

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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 Customer Innovation Admin team, on behalf of ComEd, is seeking proposal submissions from qualified vendors to conduct a HVAC Contractor Development Study focused on expanding HVAC participation within ComEd's C&I energy efficiency service providers (EESPs).

This research will develop qualitative and quantitative insights regarding the readiness, barriers, business models, training needs, and market dynamics affecting HVAC measure delivery among contractors currently participating in ComEd's C&I EESP network, with particular attention to those serving small and medium business customers. The study will also assess best practices from other jurisdictions, including California and select Northeast states, to identify actionable strategies for contractor recruitment, capability development, and long-term market transformation.

The Standard Program offered by ComEd has historically achieved strong participation through lighting measures delivered by a well-established network of EESPs. However, as lighting savings opportunities decline and program portfolios increasingly emphasize comprehensive measures such as HVAC systems, controls, refrigeration, and electrification technologies, there is a need to evaluate whether the current EESP network is positioned to deliver deeper and more complex savings.

Participation in HVAC measures, particularly among EESPs serving small and medium business customers, remains comparatively limited. This suggests potential structural, technical, financial, or workforce barriers within the existing contractor ecosystem. Expanding EESP capabilities beyond lighting may require targeted training, credentialing, incentive alignment, business model support, and/or modifications to program design.

Other jurisdictions, including California and states in the Northeast, have invested in contractor development strategies to expand HVAC-focused networks and increase participation in higher-complexity measures. These efforts may provide insights into scalable approaches for contractor recruitment, training, quality assurance, and market transformation. Accordingly, ComEd seeks to better understand the challenges and opportunities associated with expanding and strengthening its EESP network to support greater participation in HVAC and other non-lighting measures, particularly for EESPs serving small and medium business customers.

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.

1. Assess the current composition, capabilities, and business models of contractors participating in ComEd's network, with particular focus on those primarily delivering lighting measures.
2. Identify barriers limiting HVAC measure participation among existing contractors, including technical expertise, capital requirements, workforce constraints, sales capabilities, permitting complexity, customer demand, and perceived program friction.
3. Evaluate the distinct challenges and opportunities faced by contractors serving small and medium business customers compared to those serving midstream or larger commercial markets.
4. Identify gaps in training, certification, financing access, and operational support that may limit contractors' ability to deliver HVAC measures.
5. Examine contractor development models implemented in jurisdictions with robust HVAC contractor networks, including workforce training programs, credentialing pathways, performance-based incentives, midstream strategies, and quality assurance frameworks.
6. Assess recruitment opportunities for new HVAC-focused contractors not currently participating in ComEd's network.
7. Estimate the potential increase in HVAC participation and associated energy savings under alternative contractor development scenarios.
8. Provide actionable recommendations for program design modifications, contractor support mechanisms, and phased implementation strategies to expand HVAC-focused contractor participation.

## Project Budget, Timeline, and Phases

The anticipated project kickoff is May 2026. The expected project end date is December 2026. About \$100,000 to \$150,000 has been allocated for this 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 deliverable for this project will be a final report written using the ComEd Customer Innovation report template and presentation. 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 30-50 pages.

The following are key outcomes that ComEd expects from this research. Vendors are encouraged to recommend additional key outcomes.

- A comprehensive characterization and assessment of Contractor Development concepts to expand contractor participation to new measures within ComEd programs from their existing EESPs.
- An actionable plan for the program to implement innovative strategies regarding the readiness, barriers, business models, training needs, and market dynamics affecting HVAC measure delivery among contractors currently participating in ComEd's C&I EESP network, with particular attention to those serving small and medium business customers.
- Workflow(s) outlining ways that ComEd programs could most effectively implement learnings from this research, including cross-program coordination, recommendations for program design modifications, contractor support mechanisms, and phased implementation strategies to expand HVAC-focused contractor participation.

## 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.

**Task 1: 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 the Customer Innovation Admin team immediately for discussion.

**Task 2: 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.

**Task 3: 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.

**Task 4: Research Implementation Plan.** Contractor will create and deliver a detailed Research Implementation Plan. The plan should outline specific research objectives, sampling strategy, segmentation of contractor types (e.g., lighting-focused EESPs, HVAC contractors in-network, HVAC contractors out-of-network, etc.), and detailed methodologies for primary and secondary research.

The plan should include:

- Recruitment strategy for contractors (participating and non-participating)
- Proposed jurisdictions for research
- Data collection instruments and analytical framework

*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.

**Task 5: Contractor and Market Actor Research.** Contractor will conduct qualitative research with a representative sample of contractors and relevant market actors to assess barriers, motivations, and readiness to deliver HVAC measures.

Research shall include:

- Interviews with current ComEd network contractors primarily delivering lighting measures to understand business models, training gaps, risk tolerance, capital constraints, workforce limitations, and perceived program friction related to HVAC participation.
- Interviews with in-network HVAC contractors to understand their participation experience, economics, and operational challenges.
- Interviews with HVAC contractors not currently participating in ComEd's network to assess awareness, interest, barriers to entry, and recruitment opportunities.
- Engagement with distributors, manufacturers, trade associations, workforce training entities, and other relevant ecosystem stakeholders to understand supply chain dynamics and credentialing pathways.

The research should focus on contractors serving small and medium business customers and the distinct challenges of that segment.

*Deliverables:* Draft and final interview guides.

**Task 6: Contractor Network Assessment and Gap Analysis.** Contractor will assess the current composition and capabilities of ComEd’s contractor network relative to expanded HVAC program goals.

Activities may include:

- Analysis of existing contractor participation data (if provided by ComEd).
- Characterization of current measure mix and specialization areas.
- Identification of capability gaps (technical training, certifications, staffing, financing access, QA readiness).
- Segmentation of contractors by readiness level (e.g., ready now, upskill with support, unlikely to transition).
- Identification of structural barriers within current program design that may limit HVAC participation.

*Deliverables:* Summary of Contractor Network Assessment findings, including a clear articulation of capability gaps and readiness segmentation, included in final report.

**Task 7: Benchmarking and Best Practice Review.** Contractor will conduct secondary research and targeted interviews to examine contractor development models implemented in select jurisdictions.

This task should evaluate:

- Contractor recruitment strategies
- Workforce development and credentialing pathways
- Performance-based incentive models
- Midstream and upstream HVAC engagement strategies
- Quality assurance and compliance frameworks
- Financing and capital access supports
- Trade ally tiering or preferred contractor models

Contractor should identify elements transferable to ComEd’s market and those that may require adaptation.

*Deliverables:* Benchmarking summary highlighting best practices, lessons learned, and applicability to ComEd’s service territory, included in final report.

**Task 8: Contractor Development Strategy.** Contractor will develop actionable recommendations for expanding HVAC-focused contractor participation.

This task shall include:

- A prioritized set of contractor development strategies (e.g., training cohorts, recruitment campaigns, incentive redesign, tiered contractor programs, sales enablement tools).
- Phased implementation roadmap.
- Estimated participation uplift under alternative scenarios.
- High-level estimate of incremental energy savings potential associated with expanded HVAC contractor engagement.
- Identification of risks and mitigation strategies.

*Deliverables:* Draft and final Contractor Development Strategy summarizing findings, scenario analysis, and clear recommendations, included in final report.

**Task 9: 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. In addition, the report should outline a proposed plan for a second phase of research that would further develop and/or test the tools and/or strategies identified in this pilot. 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.

## 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 April 13, 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 **April 13, 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.

The list of organizations who opted to have their organization's name and primary contact information released will only be shared with the list of organizations who opted to have this information released. This list is intended solely to support voluntary teaming discussions among prospective bidders. Inclusion on this list does not imply endorsement and is not required to submit a proposal.

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 April 27, 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 April 13, 2026** will be responded to by **11:59pm CT on April 20, 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	April 6, 2026
Intent to bid due	11:59 pm CT on April 13, 2026
Deadline to submit questions	11:59 pm CT on April 13, 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 April 13, 2026
BrightLine, on behalf of ComEd, releases names of vendors interested in potential partnership on RFP	11:59 pm CT on April 15, 2026

RFP Activity	Date
BrightLine, on behalf of ComEd, posts responses to questions	11:59 pm CT on April 20, 2026
RFP submissions deadline	11:59 pm CT on April 27, 2026
Respondents will be notified of the next steps after ComEd and the Customer Innovation Admin team have reviewed submissions	Week of May 18, 2026

## Additional Details

Submissions are limited to 10 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 10-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 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 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 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 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 10-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.