



PUSH for Clean Heat

Request for Proposals

Date of Issue: 03/08/2021

Proposal Due Date: 04/09/2021

Issued by: PUSH Buffalo

Proposals must be submitted to Sarah Burger – Sarah@pushbuffalo.org

Questions may be directed to Sarah Burger – Sarah@pushbuffalo.org

1. OVERVIEW

PUSH Buffalo is releasing this request for proposals (“RFP”) for installers of home energy efficiency, weatherization, and clean heating and cooling technologies to provide installation services to homes and businesses in Erie County as part of the PUSH for Clean Heat Campaign. **PUSH for Clean Heat is a project of PUSH Buffalo.**

PUSH for Clean Heat is a community-based outreach, and education campaign to encourage the installation of Clean Heat technologies in homes across Erie County, led by **PUSH Buffalo** that will encourage the adoption of home energy efficiency and envelope improvements measures, heat pump water heaters (“HPWHs”), air-source heat pumps (“ASHP”), and ground-source heat pumps (“GSHP”). Over the course of **1 year**, PUSH for Clean Heat will seek to greatly increase the number of homes and businesses in Erie County that are heating and cooling with clean heating and cooling technologies.

PUSH for Clean Heat is seeking 1-2 installers per technology - ASHPs, GSHPs and envelope improvements- to work closely with the PUSH for Clean Heat and PUSH Green to serve as trusted campaign partners to serve campaign participants, install home weatherization and relevant clean heating and cooling technologies, and expand awareness of these technologies over the course of the program. The goals of PUSH for Clean Heat include:

- **Increase the customer awareness of** energy efficient and clean heating and cooling technologies through community-based marketing, outreach, and education activities.
- **Enroll a** minimum of 50 home and business owners in the program, complete a minimum of 25 home energy audits, support the installation of weatherization/efficiency measures and air- and ground-source heat pumps in a minimum of 20 homes
- **Build long-term interest and demand** for energy efficient and clean heating and cooling technologies after the conclusion of the 1 year. Encourage residents to think of heat pumps as the next option when it is time to replace current heating and hot water heating systems.
- **Act as an advocate** for residents and businesses in Erie County throughout the process of education, pricing, installation, and operation.
- **Share knowledge around the goals of the Climate Leadership and Protection Act (CLCPA)**, namely 100% carbon free electricity by 2040 and equitable reinvestment in disadvantaged communities.
- **Create good green jobs and career pathways for disadvantaged workers and priority populations**, including low income, unemployed, and underemployed residents; women; returning citizens; immigrants and refugees; and people of color.

PUSH for Clean Heat invites proposals from businesses (“Installers”) who can design, install, and perform regular maintenance home energy efficiency and weatherization measures, ASHP, and/or GSHP. PUSH for Clean Heat will select 1-2 Installers per technology and will accept joint proposals from multiple Installers applying as a single team.

The selected Installer(s) will work collaboratively with the PUSH for Clean Heat to design and implement a **1 year** community marketing and outreach campaign, which is expected to begin in February 2021. The selected Installer(s) will be the sole recipients of customer leads from PUSH for Clean Heat and will be actively promoted by the community as PUSH for Clean Heat's competitively selected Installers. **Installers will receive qualified leads from PUSH for Clean Heat and will be included in marketing done by PUSH for Clean Heat.**

2. ABOUT PUSH FOR CLEAN HEAT

PUSH for Clean Heat is organized by PUSH Buffalo with financial support from the New York State Energy Research and Development Authority (NYSERDA) Clean Heating and Cooling Communities Program.

PUSH for Clean Heat is a campaign meant to educate Erie County residents about the transition away from fossil fuels. Part of this transition involves the installation of electric energy efficient heating and cooling systems and water heaters. To reduce overall operation costs and increase comfort, envelope improvements will be included in the PUSH for Clean Heat Campaign. When a resident decides they are ready to install clean heat technologies or envelope improvements, they will be connected to an Installer for that specific technology. In the case where there are 2 Installers per technology, PUSH will create a systematic way to split leads.

PUSH for Clean Heat looks to act as a resource and partner at all points in the installation process for residents in Erie County looking to install ASHPs, GSHPs, HPWHs and envelope improvements. Where the resident qualifies for work through NYSEDA's Assisted Home Performance or Empower programs, PUSH Green will act as a resource and partner with the resident for those programs.

3. SUMMARY OF CAMPAIGN ACTIVITIES

- Educate Erie County residents, building owners and developers about clean heat.
 - In the case that COVID is still prevalent – conducting outreach by mail, social media, 1 on 1 outreach, videos and webinars.
 - In the case that COVID is mitigated - - conducting outreach by mail, social media, 1 on 1 outreach, videos/webinars, in person events and tours.
- Identify successful installations and create case studies, in video or print format, that can be used as educational materials.
- Be a resource for those interested in installing ASHP, GSHP, HPWHs, and envelope improvement measures to ask questions.
- Connect those interested in installing clean heat or envelope improvement measures with the Installers of the campaign.
- Connect under- and unemployed individuals with training and employment opportunities to install clean heat technologies and envelope improvement measures.

4. INSTALLER ELIGIBILITY

At a minimum, Installers must meet the following eligibility requirements to participate in PUSH for Clean Heat. Prospective Installers must:

1. At minimum hold all relevant licenses, insurances and other requirements for the jurisdiction(s) served by PUSH for Clean Heat
2. Meet eligibility requirements for or be approved as a participating Installer in all relevant NYSERDA program opportunities, including: **(1)** [Home Performance with ENERGY STAR](#) (for home efficiency/weatherization Installers), and **(2)** [NYS Clean Heat Pump Program](#) (for ASHP and GSHP Installers).
3. Have completed a minimum of 15 unique installations within New York State or 10 unique installations within the areas served by the campaign or 10 installations through the aforementioned relevant NYSERDA programs.
4. Be willing to work in coordination with any other selected Installer(s) for lead management and outreach activities.
5. Submit a complete proposal containing all required information described in Section # 7 Proposal Requirements by **April 9, 2021 at midnight**.

5. SCOPE OF SERVICES

The scope of services to be provided by Installers participating in PUSH for Clean Heat are described below:

Outreach and Education: Participating Installers will be responsible for working closely with the PUSH for Clean Heat team to directly support marketing and outreach activities to promote awareness of PUSH for Clean Heat. Over the course of PUSH for Clean Heat, this may include:

- Collaborating with the PUSH for Clean Heat team to refine the campaign marketing strategy and activities prior to the launch of the campaign and over the course of the campaign;
- Participating in in-person educational “meet the Installer” events, where the Installer will have the opportunity to meet and collect sign-ups from customers. Virtual events may be held in lieu of in person events *depending on the COVID related requirements from county, state and federal officials*;
- Participating in other public in-person events coordinated by the PUSH for Clean Heat team;
- Working with the PUSH for Clean Heat team to ensure that campaign staff and volunteers are familiar with the Installer’s technology, operations, and workflow;
- **Addressing inquiries from prospective customers and the PUSH for Clean Heat team;**
- Providing information to prospective customers about relevant technologies, incentive programs, and other initiatives supported by PUSH for Clean Heat;

- Supporting other relevant marketing, outreach, and educational activities (e.g. providing content for marketing materials, case studies, tours, developing stories, etc.).

Selected installers will also be asked to provide standardized, transparent pricing for the technologies they will install (see Attachment D), which will be made publicly available to prospective customers on the PUSH for Clean Heat website, with clear wording that pricing will vary by home and the system installed. Pricing proposals from installers that are not selected to serve PUSH for Clean Heat will be kept confidential.

Installation Services: Participating Installers will provide site visits, quotes, and installation services in a timely fashion to program participants. This shall include:

- Conducting outreach to customers to screen customer suitability for relevant technologies;
- Providing assessments to evaluate a site's suitability for relevant technologies, including any structural, electrical, or mechanical issues;
- Completing heating/cooling load calculations (e.g. Manual J) using industry best practices and ACCA-approved software, if applicable;
- Providing pricing quotes to customers within **21 days** after completion of a site visit, which shall reflect pricing consistent with information provided in the Installer's Pricing Proposal;
- Providing information to customers about all relevant incentives, as well as basic information on system financial analysis and energy savings potential;
- Installing relevant technologies that meet the minimum requirements for eligibility for relevant NYSERDA incentive programs, including the Home Performance with ENERGY STAR program, Air Source Heat Pump Program, and Ground Source Heat Pump Rebate Program;
 - *Note: If Applicant seeks to install equipment that do not meet the eligibility requirements for these incentive programs, Applicant shall provide this information in the proposal materials, as well as reasoning for including equipment and how it will be presented to customers.*
- Providing turnkey contracting, permitting, installation, and all other activities associated with the sales and installation process within **six months of contract signing**, unless mutually agreed upon with the customer;
- Completing incentive paperwork and providing support for completing financing paperwork (if applicable) for all customers who sign contracts;
- Providing clear communication to customers about installation timeline, expected pricing, and any anticipated delays.

Lead Management and Reporting: Participating Installers will manage customer leads provided to the installer by PUSH for Clean Heat, track data on leads, and work with the PUSH for Clean Heat team to provide regular reporting so that the PUSH for Clean Heat team are apprised of the status of customers participating in the program. This shall include:

- Tracking and managing leads to provide timely customer service to all interested leads sent to the Installer by PUSH for Clean Heat;
- Developing a process in collaboration with the PUSH for Clean Heat team and the other Installer, if applicable, to manage leads that are not suitable for the technology and, if relevant, share leads with other Installer(s) if the site is not suitable for the Installer’s technology;
- Providing data on lead status on a bi-weekly basis to the PUSH for Clean Heat team, which shall include but not be limited to: date of Installer contact, date of Installer site visit, type of heat pump recommended by the contractor, any envelope improvements recommended by the contractor, pricing and incentives provided and potential date of installation, if applicable. This information will be maintained on a shared spreadsheet between PUSH for Clean Heat and each Installer. ;
- Participating in brief bi-weekly calls with members of the PUSH for Clean Heat team;
- Providing a **final** report detailing the following final metrics upon completion of the program:
 - Installation date
 - Project address
 - Project cost
 - For energy efficiency projects, a short description of the work completed
 - Fuel used for heating before new work
 - Fuel used for water heating before new work
 - For ASHP, GSHP and HPWHs:
 - Size of the equipment
 - Distribution system (ASHP and GSHP only)
 - Square footage of conditioned space (ASHP and GSHP only)
 - For large ASHP and GSHP projects, the annual energy savings in MMBtu and Annual Electrification MWh

Workforce Training and Utilization: Workforce development is a vital need for installation of Clean Heat technology. PUSH seeks to utilize **first source hiring** with all installers that are part of the PUSH for Clean Heat Campaign

- When there are job openings or internship opportunities at the Installer companies, installers will review qualifying potential applicants referred by PUSH first before recruiting potential applicants from other sources. Qualifying potential applicants may come from the SUNY Erie Green Building Technology Training program (first cohort finishes in Summer of 2021) or through the PUSH Community Hiring Hall. PUSH Buffalo’s Community Hiring Hall is an emerging social enterprise model that creates access to hands-on and classroom training and living wage jobs for disadvantaged workers, and workforce solutions for local contractors in general construction and sustainability sectors. The Community Hiring Hall can serve as the employer of record for disadvantaged workers and provide contractors with competitively priced entry-level and skilled labor.

6. RFP AND PROGRAM TIMELINE

Please note that dates provided below are estimates and subject to change.

RFP/Program Milestone	Date
RFP released	3/8/2021
Written questions due	3/23/2021
1 hour Q&A webinar with PUSH	3/24/2021
Question responses posted online	3/25/2021
Proposals due	4/9/2021
Interviews with Installers	4/12/2021-4/16/2021
Installer(s) announced	Week of 4/19/2021
Campaign launch event	Week of 4/19/2021
Campaign public outreach and education events	Mid April 2021-Mid April 2022
Deadline for participants to sign contracts	February 1, 2022
Deadline to complete installations contracted through PUSH for Clean Heat	August 1, 2022

7. PROPOSAL REQUIREMENTS

Proposals must include the following documents:

- **Proposal Checklist (Attachment A)**
- **Completed Individual Application Form (Attachment B):** If you are submitting a proposal as a team with multiple Installers, each participating Installer must complete this application.
- **Core Proposal (Attachment C)**
- **Pricing Proposal (Attachment D)** - All pricing proposals provided by Installers who are not selected will be kept confidential.

Proposals must also include the following documents. If you are submitting a proposal as a team with multiple Installers, each participating Installer must include this information.

- **Addendum 1: Example customer project proposal and contract**
- **Addendum 2: Sample marketing materials** (if available)
- **Addendum 3: Relevant licenses, proof of insurance and worker's compensation of key members of the Installer team**, including any subcontractors (if necessary)
- **Addendum 4: COVID 19 Health and Safety plan**
- **Addendum 5: 3 sample installation photos**

8. APPLICATION INSTRUCTIONS

Written questions may be submitted to sarah@pushbuffalo.org by **3/23/2021**. Responses will be posted online at [<https://pushforcleanheat.org/installers/#request-for-qualifications>] by **3/25/2021**.

All proposals must be received via email by midnight on 4/9/2021. Late proposals may be rejected without review by the PUSH for Clean Heat selection committee.

9. EVALUATION CRITERIA

In order to be evaluated by the PUSH for Clean Heat selection committee, the Applicant must meet all eligibility requirements described in [Section IV. Installer Eligibility]. Proposals that do not include all required information may not be reviewed by the selection committee at its sole discretion.

Proposals will be evaluated by the selection committee in accordance with the criteria listed below. Additionally, a select number of applicants will be invited to interview with the selection committee and provide a brief presentation on their firm's qualifications to serve the campaign:

- **Overall quality and value:** Overall quality of the proposal and specified equipment.
- **Experience:** Degree of Installer's experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing all relevant technologies included in the Installer's proposal, record of customer service, and experience working within the region to be served by PUSH for Clean Heat
- **Outreach and marketing plan:** Ability of the proposed outreach and marketing activities to drive community adoption of relevant technologies and reduce costs of installations.
- **Collaboration:** Ability of the Installer to collaborate with the PUSH for Clean Heat team and any other selected installer(s) (if applicable) to implement a successful outreach and education campaign focused on all relevant technologies.
- **Capacity and implementation:** Ability to provide timely, quality customer service and installations throughout the duration of the program, as well as ability to work with the PUSH for Clean Heat team. Ability of installer to educate customer on benefits of technologies and communicate options available.
- **Pricing proposal:** Quality, simplicity, clarity, and value of the proposed equipment, price adders, and contract terms

- **Interview:** Quality of interview presentation and responses to interview questions
- **Values: Demonstrated commitment to eliminating dependence on fossil fuel use by residents of WNY and reducing deployment of fossil fuel-based combustion appliances through installation of residential heating and cooling technologies.** Heat pumps are part of the transition away from fossil fuels, and it is vital to us that leads provided to installers are not used to install another version of fossil fuel-based heating.
- **Good green jobs for all** – The installer demonstrates a commitment to collaborate in workforce training and utilization based in a first source hiring strategy that creates access to hands-on training and living wage jobs for disadvantaged workers.

10. GENERAL CONDITIONS

Indemnification

PUSH for Clean Heat is a program of PUSH Buffalo. Installer(s) will protect, indemnify and hold harmless PUSH Buffalo, and their officers, directors, employees, agents, and affiliates from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, experts' and attorneys' fees and expenses) imposed upon, incurred by or asserted against PUSH for Clean Heat Campaign Members and PUSH Buffalo, resulting from, arising out of or relating to the Installer's work completed through PUSH for Clean Heat. The obligations of the Installer(s) under this indemnity will survive the expiration or termination of PUSH Buffalo and are not limited by any insurance coverage required under this RFP.

Limitation of Liability

PUSH Buffalo shall not be liable to the Installer(s) for any special, indirect, incidental, consequential, punitive, or exemplary damages of any kind whatsoever, whether based on contract, warranty, tort (including negligence or statutory liability), or otherwise.

Non-discrimination

Installer(s) agrees and warrants that they will not discriminate or permit discrimination against any person or group of persons in any manner prohibited by the laws of the United States or of the state of New York;

Waiver Authority

PUSH Buffalo reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of this RFP at any time prior to Installer selection.

Confidentiality Statement

Proposal documents are generally considered to be a matter of public record once the contract for work has been awarded. PUSH for Clean Heat and PUSH Buffalo will endeavor to keep information confidential if the proposer marks the subject information as confidential (including pricing proposals for all applicants that are not selected for PUSH for Clean Heat), provided that the matters are withheld from the public are in such a manner as to leave no discretion on the issue.

Disclaimer

This RFP does not commit the PUSH Buffalo to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. PUSH Buffalo reserves the right to accept or reject any or all proposals received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.

ATTACHMENT A – PROPOSAL CHECKLIST

INSTALLER PROPOSAL CHECKLIST

Please include the following items in your application. Incomplete proposals or proposals not received before the deadline of [date] may not be considered by the PUSH for Clean Heat selection committee.

- ___ **Proposal Checklist and Cover Letter (Attachment A)** (one per proposal)
- ___ **Individual Application Form (Attachment B)** (one for each Installer participating in the proposal)
- ___ **Core Proposal (Attachment C)** (one per proposal)
- ___ **Pricing Proposal (Attachment D)** (one per proposal)
- ___ **Addendum 1: Example customer project proposal and contract** (one for each Installer)
- ___ **Addendum 2: Sample marketing materials** (if available, for each Installer)
- ___ **Addendum 3: Relevant licenses of key members of the Installer team** (for each Installer and any subcontractors that will be used)
- ___ **Addendum 4: COVID 19 health and safety plan**
- ___ **Addendum 5: 3 installation photos**

ATTACHMENT B: INDIVIDUAL APPLICATION FORM

Note: If multiple Installers are applying as part of this proposal, this attachment must be completed by each Installer individually.

COVER LETTER

The undersigned is the duly authorized representative of the company or entity identified below (the "Company"), with full authority to sign this document and to submit this proposal pursuant to the PUSH for Clean Heat Request for Proposals (the "RFP").

I hereby certify:

- The Company is duly organized and in good standing under the laws of the jurisdiction in which it is organized. The financial statements are true, correct and complete and fairly present the financial condition of the Company as of their date. Since the date of the most recent financial statements, there has been no material adverse change in the Company's financial condition. All tax returns required to be filed in any jurisdiction have been duly filed, and all taxes due in respect of the Company have been duly paid.
- The Company has read the RFP, understands it and is familiar with its requirements.
- The information contained in this proposal, and any correspondence or other documentation relating to this proposal, are all true, correct and complete. The information disclosed by the Company in this proposal relating to the nature of the Installer partnership (if applicable), corporate partnerships, affiliations and other relationships is true, correct and complete.
- The Company understands and acknowledges that, until a final selection is made under the RFP, the PUSH for Clean Heat team may enter into discussions with the Company to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for the relevant community. Moreover, the PUSH for Clean Heat team reserves the right (i) to reject any or all proposals; (ii) to waive defects or irregularities in any proposal; (iii) to discontinue discussions at any time and for any reason; (iv) to correct inaccurate awards; (v) to change the timing or sequence of activities related to PUSH for Clean Heat; (vi) to modify, suspend or cancel PUSH for Clean Heat; and (vii) to condition, modify or otherwise limit the mandate pursuant to the RFP.

By submitting this proposal, the Company represents and warrants that, if it is selected under this RFP, it will comply with the terms of the RFP and will perform all of the duties and obligations of the "Selected Installer" under the RFP.

Installer: _____

(Printed Name of Installer Organization 1)

By: _____ Title: _____

(Printed Name of Authorized Representative)

Signature: _____

Date: _____

INSTALLER INFORMATION

Company Information

Company Name	
Headquarters Address	
Additional locations with proximity to Erie County	
Service Territory	
Company Website	
Technologies to be installed	

Company Team

Primary Point of Contact	
Contact Title	
Contact Phone	
Contact Email	
Total number of full-time employees	
Total number of part-time employees	

List all relevant key staff (e.g. salespeople, site assessors, Installers, project managers, and key administrative staff) in your company who will be working on PUSH for Clean Heat, as well as roles,

years of experience, and relevant certifications/licenses held by each. Add additional rows as necessary. This information may also be submitted as an additional addendum.

Staff #1	
Staff #2	
Staff #3	
Staff #4	
Staff #5	
Staff #6	
Staff #7	
Staff #8	

Please provide the names and contact information of any subcontractors (e.g. electricians, plumbers) who would support installations through this program.	
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Company Experience

Number of years in operation	
Number of technology installations in New York State in past 12 months	
Number of installations in [community name region] in past 12 months	

<p>Please describe any other relevant experience, skills, and capabilities of your company.</p>	
<p>Please provide references for at least five (5) projects within the state completed within the last three (3) years.</p>	

Installation Capacity

Describe the number of full- or part-time salespeople and Installers who will be made available to serve PUSH for Clean Heat during the course of the campaign, as well as their capacity for site assessments and installations.

	Number of full-time equivalents (FTEs)
Expected average number of full-time salespeople active in community during sign-up period	

Expected average number of physical site assessments conducted <u>per week</u> during sign-up period	
Average estimated number of installations that can be performed <u>per month</u> within community	

How will seasonal fluctuations affect your ability to make the capacity described above available?	
Are you applying to serve as the selected Installer of any other Clean Heating and Cooling Community?	
Beyond single-family homes, what other project types (e.g. multi-family/condo associations of 5+ units, small commercial, etc.) does your company complete?	
Describe the financial health of your company and how you will manage the financial requirements related to the volume of installations PUSH for Clean Heat is expected to produce.	

Please provide information about all licenses and insurance held by your company.

New York State license number(s)	
Liability insurer, coverage, and policy number	
Worker's compensation insurer, coverage, and policy number	

ATTACHMENT C: CORE PROPOSAL

Please complete all information in this attachment where applicable. If necessary, you may provide additional information or attach additional materials to supplement this attachment.

Proposal Team

Please list all companies that are part of the proposal team (not including subcontractors)

Company Name	Technology/Role	Contact Person	Contact Phone Number	Contact Email

Community Partnership Strategy

Describe how your company will work with PUSH for Clean Heat to support outreach activities and motivate residents to install envelope improvements, air source heat pumps, ground source heat pumps and heat pump hot water heaters. Describe specific activities you would intend to complete to support PUSH for Clean Heat's marketing and education activities, as well as your plan to communicate with the PUSH for Clean Heat and your previous experience completing residential or community-level sales, marketing, and outreach efforts in the past.

Project Implementation Plan

<p>Describe your customer management process, including lead intake, lead management, screening, site visit, and installation process</p>	
<p>Describe the typical timeline for customers from lead intake through to project close-out.</p> <p>If applicable, provide the timeline for each technology offered by your team.</p>	
<p>Describe your quality assurance process, including measures to commission and protect equipment installed and how you will address any customer disputes.</p>	
<p>Describe your geographic proximity to the community and how this will affect your ability to provide services to Erie County in PUSH for Clean Heat</p>	
<p>Describe your process for handling customer leads that are not suitable for the technology(-ies) you are offering.</p>	
<p>Describe your proposed process for sharing leads with Installers in your team (if applicable) and other Installers in the program, as well as how this will offer customers a streamlined experience.</p>	

Pricing, Financing, and Incentives

<p>If applicable, please describe any discounts (e.g. flat/tiered pricing), customer incentives (e.g. referral bonuses, discounted/free systems after a certain number of contracts signed) you will offer to PUSH for Clean Heat</p>	
<p>If applicable, describe any financing options (e.g. manufacturer financing, Home Performance with ENERGY STAR, lease/power purchase agreements) you will offer to customers.</p>	
<p>Please describe how you will pass NYSERDA incentives onto the customer (if applicable) and provide support to customers to obtain other incentives.</p>	

ATTACHMENT D: PRICING PROPOSAL

Please complete all information in this attachment for all relevant technologies **you are applying to provide installation services for**. If necessary, you may provide additional information (e.g. different technology options/models, additional cost adders) or attach additional materials to supplement this attachment.

- Section 1: Air Source Heat Pumps
- Section 2: Ground Source Heat Pumps
- Section 3: Weatherization
- Section 4: Heat Pump Water Heaters

SECTION 1: AIR SOURCE HEAT PUMPS

Please provide customer proposals for the installation of an air source heat pump system for the two scenarios described below. The proposal should be presented in your company's proposed standard format for the PUSH for Clean Heat program. Descriptions of cost adders, additional options, or any additional information may be provided in a separate addendum.

SCENARIO 1

Please provide a proposal for the installation of a single-zone ductless air source heat pump matching the specifications below.

Site and system specifications:

- Heating capacity of heat pump at 5°F: 14,900 BTU/hr
- Indoor unit installation details
 - Style: wall-mounted
 - Installation method: right-hand exit through framed exterior wall (~6.5" thickness)
 - Clearance below unit: 6'-0" to living room floor
 - Available width for unit (inc. service clearances): 48"
- Outdoor unit installation details
 - Siding: vinyl
 - Mounting style: Ground stand
 - Rain cap: not required
- Lineset and condensate
 - Refrigeration lineset distance: 12'
 - Condensate: terminated to outside at elbow in lineset
 - Lineset cover: 11' of white lineset cover with wall inlet, flat 90 ell, and termination fittings
- Electrical installation
 - Main service panel: Square D Homeline 100A with four (4) available spaces
 - Distance to heat pump disconnect: 20 feet – surface mounted on exterior of home
 - GFCI outlet: located within 5 feet of the outdoor unit location
- Wireless remote control

Proposal must include the following information:

- Installed cost, including all refrigeration and electrical work
- Explanation of equipment and labor warranties
- Explanation of annual maintenance plan costs and services included (if applicable)
- Options for extended warranties, if applicable
- Any relevant upsell options and costs, including but not limited to: different indoor units (e.g. upgrade wall mount, floor mount, ceiling cassette), thermostat options, and rain cap

SCENARIO 2

Please provide a proposal for the installation of an air source heat pump system that addresses the specifications and customer outcomes described below.

Stated customer outcomes:

The customer is interested in reducing their use of oil for heating in their existing house area in addition to adding a heat source in a newly-refinished bonus room. They are price sensitive and have budgeted for either two single-zone, wall-mounted units or a multi-zone unit serving two wall-mounted units.

Site and system specifications:

Existing Area, Zone 1: Main living space in open concept floor plan that includes the living room, dining area, and kitchen. Heating demand of the space is 22,200 BTU/hr at a design temperature of 0°F. The space is currently served as a single zone with an oil furnace and central air conditioning system that serves the entire house except Zone 2. The total heating load for Zone 1, which includes three bedrooms, a utility room with limited space, and two bathrooms, is 42,000 BTU/hr.

Zone 2: 600sf bonus room above garage with heating demand of 12,100 BTU/hr at design temperature of 0°F. The heat pump will be only heat source for this space.

The designer should select and make note of the design temperature they will be using.

- Indoor unit installation details
 - Style: Wall-mounted
 - Installation method:
 - Zone 1: Interior partition between living room and bedroom closet; lineset run to outside of building through exterior wall of closet
 - Zone 2: Exterior wall; 16 feet of height from exit hole to outside grade
 - No clearance issues
 - Wireless remote control
- Outdoor unit installation details
 - Configuration: Sufficient space for separate units co-located with indoor units or single multi-zone outdoor unit
 - Siding: vinyl
 - Mounting style: ground stand
 - Rain cap: not required
- Lineset and condensate
- Refrigeration lineset distances:
 - Zone 1: 15' as single-zone unit; 35' as multi-zone unit
 - Zone 2: 20' as single-zone unit; 40' as multi-zone unit
 - Condensate: terminated to outside at elbows in lineset
 - Lineset cover:
 - Single-zone units scenario: 50', two wall inlets, two termination fittings, three flat 90 ell, two couplings
 - Multi-zone unit scenario: 60' of single unit lineset, 15' of combined lineset, two (2) wall inlets, one (1) large termination fitting, three (3) small flat 90 ells, five (5) small couplings, two (2) large couplings, one (1) tee

Proposal must include the following information:

- Explanation of approach that describes why the selected scenario was chosen
- Installed cost, including all refrigeration and electrical work
- Explanation of equipment and labor warranties
- Explanation of annual maintenance plan costs and services included (if applicable)
- Options for extended warranties, if applicable
- Any relevant upsell options and costs, including but not limited to: different indoor units (e.g. upgrade wall mount, floor mount, ceiling cassette), thermostat options, and rain cap
- Provide recommendations on how the heat pump should be used with the existing heating system

OPTIONAL

Provide a second quote assuming customer is not price sensitive and is interested in eliminating as much of their oil consumption as possible in the existing space, in addition to adding a heat source for the newly-refinished bonus room. This quote may include a larger multi-zone system, multiple single-zone systems, and/or or a centrally ducted system.

SECTION 2: GROUND SOURCE HEAT PUMPS

Please provide proposals for the installation of a ground source heat pump system for the two scenarios described below. The proposal should be presented in your company's proposed standard format for the PUSH for Clean Heat program. Descriptions of cost adders, additional options, or any additional information may be provided in a separate addendum.

SCENARIO 1

Please provide a proposal for a ground source heat pump system matching the specifications below:

Site and system specifications:

- 2,200 square foot, two-story home located on a ½ acre plot in Hamburg, NY with no septic system
- Heating load of 54,000 Btu/hr, cooling load of 21,000 Btu/hr
- Existing system is an oil-fired boiler with forced hot water distribution and an indirect-fired hot water heater
- Ductwork for existing central AC system is available
- 50 feet from borehole/trenching to building exterior
- 50 feet of casing
- System should be designed to meet 100% of heating load

The system must meet all installation criteria for NYSERDA's Ground Source Heat Pump Rebate Program (and per RFP Section 4 – Installer Eligibility, installer must be a participating installer in NYSERDA's program and install rebated systems by launch of program), including:

- Specified EER/COP efficiency requirements
- Minimum of five-year equipment warranty and three-year labor warranty
- System equipment must be sized using Manual J and Manual S calculations
- For closed-loop systems, borehole depth sufficient to provide minimum entering water temperature of 30°F

Describe how your proposed system might exceed these requirements where applicable (e.g. warranties and system efficiencies above NYSERDA requirements).

Please detail costs for different system configuration options typically offered by your company (e.g. vertical and horizontal closed loop, standing column well). Please detail the equipment to be provided, well/trench depth or length, number of bore holes, and any other assumptions made regarding the system. Please also submit a system design to validate your proposed system specification.

Please provide itemized costs and descriptions for common additional system cost adders. Please provide information about the adders listed below, as well as any other cost adders typically offered by your company:

- **Water heater solution (required):** Please provide one or more options for replacing the existing indirect-fired water heater
- **Removal of existing indoor oil tank (required)**
- **Removal of existing HVAC equipment (required)**
- **Annual service plan (if available):** Please describe services included
- **Extended warranty options (if available):** Please describe services included
- **Additional permitting fees (if applicable):** Please describe any additional fees related to permitting that you pass along to the client
- **Electrical service upgrade from 100A to 200A:** Range of costs is acceptable
- **Monitoring system**
- **Upgrades or downgrades to different model lines**

SCENARIO 2

Please provide detailed information and costs for a ground source heat pump system matching the specifications below:

Site and system specifications:

- 2,200 square foot two-story home located on a ½ acre plot in Buffalo, NY with no septic system
- Heating load of 54,000 Btu/hr, cooling load of 21,000 Btu/hr
- Existing system is an oil-fired furnace with a central air conditioning system and a standalone oil storage hot water heater
- 50 feet from borehole/trenching to building exterior
- 50 feet of casing
- System designed to meet 100% of heating load

The system must meet all installation criteria for NYSERDA’s Ground Source Heat Pump Rebate Program (and per RFP Section 4 – Installer Eligibility, installer must be a participating installer in NYSERDA’s program and install rebated systems by launch of program), including:

- Specified EER/COP efficiency requirements
- Minimum of five-year equipment warranty and three-year labor warranty
- System equipment must be sized using Manual J and Manual S calculations
- For closed-loop systems, borehole depth sufficient to provide minimum entering water temperature of 30°F

Describe how your proposed system might exceed these requirements where applicable (e.g. warranties and system efficiencies above NYSERDA requirements).

Please detail costs for different system configuration options typically offered by your company (e.g. vertical and horizontal closed loop, standing column well). Please detail the equipment to be provided, well/trench depth or length, number of bore holes, and any other assumptions made regarding the system. Please also submit a system design to validate your proposed system specification.

Please provide itemized costs and descriptions for common additional system cost adders. Please provide information about the adders listed below, as well as any other cost adders typically offered by your company:

- **Water heater solution (required):** Please provide one or more options for replacing the existing indirect-fired water heater
- **Removal of existing indoor oil tank (required)**
- **Removal of existing HVAC equipment (required)**
- **Annual service plan (if available):** Please describe services included
- **Extended warranty options (if available):** Please describe services included
- **Additional permitting fees (if applicable):** Please describe any additional fees related to permitting that you pass along to the client
- **Electrical service upgrade from 100A to 200A:** Range of costs is acceptable
- **Monitoring system**
- **Upgrades or downgrades to different model lines**

SECTION 3: WEATHERIZATION

Please provide detailed cost proposals for weatherizing the two homes described in the scenarios below. In addition, please submit further information on hourly rates, mark-up on materials, and per item pricing in sections below.

SCENARIO 1

Please provide proposed list of improvements and costs for a home weatherization project for a home with the following conditions, with the goal of making the building envelope of the house heat pump ready:

Existing Site and System Conditions

- 1970's ranch home with attached garage
- 24'x40'
- 2x4 walls with fiberglass insulation
- R-19 batts in attic
- Vinyl siding.
- Basement is uninsulated poured concrete.
- 1650 CFM50

Example photograph below:



SCENARIO 2

Please provide proposed list of improvements and costs for a home weatherization project for a home with the following conditions, with the goal of making the building envelope of the house heat pump ready:

Existing Site and System Conditions

- 100 year-old two story farm house
- Wood clapboard siding
- 2,300 square feet
- 2x4 walls, empty
- Attic has R-11 batts on top of 3" blown rock wool
- 3600 CFM50
- Basement is dry-laid fieldstone, dirt floor

Example photograph below:



HOURLY RATES AND MARK UP

Please list your company’s hourly labor rates:

Please list your company’s mark-up on materials:

PER ITEM PRICING

In addition to the scenario pricing above, please provide further details on the per unit pricing for the various weatherization components. Please indicate both base rate for a minimum quantity and any additional rates that may change with increased quantity (for example, open attic insulation 6” depth is \$X per square foot for the first XXX square feet and \$X per square foot for any additional square feet after the first 500).

Major Component		Base rate	Adder	Comments
Air sealing and ventilation options				
Air Sealing		\$ per hour	\$ per hour	
Door Weather-stripping and Sweep		\$ per door	\$ per door	
Attic ventilation systems				
	Ridge vent	\$ per linear foot	\$ per linear foot	
	Soffit vent	\$ per vent	\$ per vent	
	Gable vent	\$ per vent	\$ per vent	
	Roof vent	\$ per vent	\$ per vent	
Bathroom vents				
	Less than 4 feet to outside	\$ per vent	\$ per vent	
	More than 4 feet to outside	\$ per vent	\$ per vent	
Insulation options				
Sidewall insulation				
	4” dense pack cellulose	\$ per sq ft	\$ per sq ft	
	6” dense pack cellulose	\$ per sq ft	\$ per sq ft	
	4” spray foam	\$ per sq ft	\$ per sq ft	
	6” spray foam	\$ per sq ft	\$ per sq ft	
Attic insulation (open)				
	6” settled depth cellulose	\$ per sq ft	\$ per sq ft	
	8” settled depth cellulose	\$ per sq ft	\$ per sq ft	
	10” settled depth cellulose	\$ per sq ft	\$ per sq ft	
	12” settled depth cellulose	\$ per sq ft	\$ per sq ft	

	14" settled depth cellulose	\$ per sq ft	\$ per sq ft	
Attic Insulation (floored)				
	4" packed cellulose	\$ per square foot	\$ per square foot	
	6" packed cellulose	\$ per square foot	\$ per square foot	
	8" packed cellulose	\$ per square foot	\$ per square foot	
	Knee Wall (netted cellulose)	\$ per square foot	\$ per square foot	
Attic Insulation (slope)				
	4" cavity	\$ per square foot	\$ per square foot	
	6" cavity	\$ per square foot	\$ per square foot	
Rim Joist Insulation (with thermal barrier/fire protection)				
	2" foam	\$ per square foot	\$ per square foot	
	3" foam	\$ per square foot	\$ per square foot	
	4" foam	\$ per square foot	\$ per square foot	
	5" foam	\$ per square foot	\$ per square foot	
Other Foam Insulation (provide R-value)				
	2" foam	\$ per square foot	\$ per square foot	
	3" foam	\$ per square foot	\$ per square foot	
	4" foam	\$ per square foot	\$ per square foot	
Existing Hot water tanks Insulation		\$ per unit	\$ per unit	
Existing Hot water pipe insulation		\$ per linear foot	\$ per linear foot	

SECTION 4: HEAT PUMP WATER HEATERS

Please provide customer proposals for the installation of **50-gallon and 80-gallon** heat pump water heaters matching the specifications below. The proposal should be presented in your company's proposed standard format for the PUSH for Clean Heat program. Descriptions of cost adders, additional options, or any additional information may be provided in a separate addendum.

Site and system specifications

- Home has suitable clearance and an existing condensate drain that can be tied into.
- Quoted installed cost should include cost of removal and disposal of existing water heater from basement or similar space.
- Quoted installed cost should include cost of standard pipes, valves, and fittings and reconnection to existing cold and hot water lines (assuming no replacement of shutoff valves)
- Quoted installed cost should include expected costs for permitting and inspection
- System must be at minimum ENERGY STAR-certified, capable of being installed in conditioned, semi-conditioned, and unconditioned spaces. PUSH for Clean Heat has a preference for systems that meet Tier 3 of NEEA's Advanced Water Heater Specification Qualified Products List (<https://neea.org/img/documents/qualified-products-list.pdf>).

Your proposal must include the following information:

- **System make, model, and UEF:** You may propose more than one model for each system size
- **Installed cost**
- **Manufacturer warranty**
- **Labor warranty**
- **Annual service plan (if available):** Please describe cost and services included
- **Any common cost adders** (e.g. electrical upgrade, condensate pump, main water shutoff valves)