



REQUEST FOR QUALIFICATIONS (RFQ) In-Home Energy Services (IES)

HVAC, Water Heating, & Weatherization Services

Energy Trust of Oregon, Inc. (“Energy Trust”), an Oregon non-profit 501(c)(3) corporation, is seeking participation interest from respondents (“Respondents”) with skills to perform energy-efficient home retrofit projects to create a limited list of prequalified contractors to participate in Energy Trust’s In-Home Energy Services (IES) Program (“Program”), which is designed to ease access for underserved customers and complete comprehensive projects that deliver substantial energy savings. Based on submissions to this RFQ, multiple contractors per targeted region may be approved for participation in a pool of In-Home Energy Services contractors.

1. Energy Trust Overview

Energy Trust is an independent nonprofit organization, selected and overseen by the Oregon Public Utility Commission (OPUC), that helps Oregon utility customers save energy on energy consumption with incentivized efficiency measures and independent generation of renewable power. Energy Trust total investments in local energy projects that save energy and generate clean energy will save utility customers \$8.9 billion on their utility bills over the lifetime of those investments. Participating customers have already saved \$4.6 billion on their energy bills since 2002. The cumulative impact of our leadership has been a contributing factor in building a sustainable energy future. More information about Energy Trust’s background, funding sources, strategic and action plans, policies, and programs are available on our website at www.energytrust.org/about.

2. RFQ Context and Overview

This RFQ is designed to solicit interest from qualified expert HVAC, Water Heating, and Weatherization contractors participation in Energy Trust’s In-Home Energy Services Program (the “Program”). This Program is focused on easing access for underserved Customers to Energy Trust programs in housing categories that have great potential for energy savings through comprehensive projects with low-to-no-cost energy upgrades.

As a result of this RFQ, Energy Trust will evaluate and select a pool of contractors to participate in this Program (each a “Participating Contractor”), which will act as a limited network of Energy Trust trade allies to collectively serve eligible Customers. Interested contractors must be committed to improving comfort and energy savings for eligible single-family, manufactured home, and small multifamily property (up to 4 units) residents in the defined regions (“Customers”).

Under this Program, Energy Trust will provide Customers, at no cost, with a Home Energy Assessment, which will result in home energy upgrades recommendations for each site. With Customer’s consent and on behalf of Customer, Energy Trust will coordinate the installation of selected home energy upgrades by requesting bids from a Participating Contractor and facilitating the Customer’s approval of and signature on the bids and scope of work. Participating Contractors will be selected for each project on an alternating basis, and/or based on availability and services offered. Energy Trust may also provide incentives to Participating Contractors that complete these upgrades to help offset some or all of the Customer’s costs. (See **Section 3 – Description of Work** of this RFQ for additional Program information.)

To be a Participating Contractor, respondents selected through this RFQ process must complete the RFQ process, enter into a written participation agreement with Energy Trust, and attend all required trainings. A limited number of Participating Contractors (roughly 2 to 3 per service type, per region) are needed to support this offer; therefore, some Respondents’ participation interest may be declined, even those that meet the minimum participation criteria. If more Participating Contractors are needed, open enrollment may be allowed after the RFQ deadline or respondents not selected during the initial RFQ window could be invited to participate. Please note that Energy Trust retains the right to terminate participation agreements for those who do not meet the requirements (listed in **Attachment A**) or neglect to submit projects.

If selected to participate, Participating Contractors will be selected to provide one or more of the following special Program offers (see **Attachment A** below for more details):

A. No-Cost Upgrades

No-Cost Upgrades	
Upgrades	Maximum Incentives
No-Cost Ductless Heat Pump	\$4,800 (1:1 DHP)
	\$7,200 (2:1 DHP)
No-Cost Ducted Heat Pump	\$9,500 (Manufactured Home)
	\$13,000 (Single Family Site Built)
No-Cost Heat Pump Water Heater	\$3,000 (straightforward installs w/out ducting)
Attic Insulation	\$3.00/ Sq. Ft. (potentially higher w/ approval)

These special no-cost Program offers will be available until funding runs out or until the promotion deadline, whichever comes first. Deadlines are as follows:

- **No-Cost Ductless Heat Pump promotion** – Limited funding remaining; please contact IES Staff to learn about promotion availability and deadlines.
- **No-Cost Insulation, Heat Pump, and Heat Pump Water Heater promotions** – Through December 31, 2025, subject to available funds.

B. Low-Cost Upgrades

Low-Cost Upgrades		
Upgrades	Primary Heating Fuel	Maximum Incentives
Extended Capacity Heat Pump	Electric	\$2,000
Extended Capacity Heat Pump	Replacing Electric Forced Air Furnace	\$6,000

Gas Furnace	Non-Condensing Gas or Any other Fuel	\$2,900
Smart Thermostat	Electric or Gas	\$250
Windows	Electric or Gas	Variable (depending on U-Value)
Attic Insulation - Manufactured Homes	Electric	Up to \$2.13 per sq ft
	Gas	Up to \$1.74 per sq ft
Wall Insulation (not available for manufactured homes)	Electric	Up to \$2.32 per sq ft
	Gas	Up to \$3.30 per sq ft
Floor Insulation	Electric	Up to \$1.09 per sq ft
	Gas	Up to \$3.65 per sq ft
Floor Insulation - Manufactured Homes	Electric	Up to \$1.45 per sq ft
	Gas	Up to \$1.76 per sq ft

3. Description of Work

Under this Program, Energy Trust will coordinate home energy upgrade installations on behalf of Customer by promoting and marketing the Program and providing free in-person Home Energy Assessments to eligible Customers, at which time an initial project scope of work will be established.

Interested Customers meeting the eligibility criteria will be referred to one or more Participating Contractors selected from the qualified pool to bid on the scope of work based on a queue order, contractor specialty, and/or availability. Customer eligibility and site details relevant to the home energy upgrades will be documented in a recommendation report and included in a bid request to contractors. Participating Contractors will review the project recommendations, schedule a site visit with the customer as needed, and submit a scope of work and project bid to a Program representative.

Before presenting the bids to the Customer, a Program representative will preapprove bids by confirming that each bid is within Program cost caps and aligned with typical market costs, confirming scope of work addresses assessment findings, and verifying that any equipment meets Energy Trust requirements. (This preapproval is only to confirm conformance with Energy Trust's Program requirements for this specific Program offering.) Energy Trust's Program representative will request Customer's approval of and signature on the final scope of work and Participating Contractors' bids, request authorization for payment be issued to Participating Contractor(s) when applicable, and then confirm with Participating Contractors that the bid(s) have been approved by Customer and installation may be scheduled.

Participating Contractors are required to adhere to the Program's participation criteria, including attending mandatory Program training sessions. Contractors' responsibilities encompass accepting Customers referred by Energy Trust and executing energy efficiency projects in qualifying homes.

All work undertaken by Participating Contractors is subject to Work Quality Verification inspections conducted by Energy Trust.

If a Participating Contractor is found to have violated Program participation agreements, such as installing equipment in homes with improper existing conditions, they will be required to forfeit their incentive(s) and may be removed from the Program.

4. RFQ Schedule

Initial application submission period: September 4 – October 2, 2024

Review turn-around: 30 business days from receipt of complete submission

Electronic submission: Complete the [Online RFQ Application](#) or complete **Attachment B** of this RFQ and submit to: InHome@energytrust.org

Participation Requirements: **Attachment A** of this document

To be considered for the first round of projects, statements of qualifications will be accepted on an ongoing basis between **September 4, 2024** and **October 2, 2024**. Energy Trust will review respondent submissions, and respondents can expect to be contacted within 30 business days from Energy Trust's receipt of a complete submission for an informational interview. In some instances, Energy Trust may request an interview with respondents before approving them for Program participation. Open enrollment may be allowed after the RFQ deadline or respondents not selected during the initial RFQ window could be invited to participate.

All RFQ submissions must be electronically submitted via the [Online RFQ Application](#) or sent to InHome@energytrust.org.

For questions, clarifications, or additional information related to this RFQ, written inquiries via email must be received by **September 20, 2024 at 5:00 pm** at InHome@energytrust.org. Responses to inquiries will be posted on the Energy Trust [Contracting Opportunities](#) page by **September 25, 2024**.

5. Instructions for RFQ Submittal

- Begin by filling out the RFQ form, complete the [Online RFQ Application](#), or address all questions within the RFQ Application Template found in **Attachment B**. It is important to focus on the sections relevant to the services respondents would provide, or are prepared to provide.
- To complete the submission, submit the [Online RFQ Application](#) or email a copy of the completed RFQ form containing responses from **Attachment B**, to InHome@energytrust.org by the close of business on **October 2, 2024**.

6. Participating Contractor Requirements and RFQ Response Evaluation Criteria

A. Company Requirements

Respondents must meet the following requirements to be considered for participation in this Program. By submitting a response to this RFQ, respondents agree that they meet, or will meet, the following requirements.

- Be an Energy Trust trade ally for the Residential program in good standing.

- Contractors that are not currently a trade ally can apply to become an Energy Trust trade ally during the RFQ period.
- Be available to serve Customers of Portland General Electric, Pacific Power, NW Natural, and Avista within the priority regions in **Attachment A**.
- Be available to serve all Customers, including rural areas, in at least one of the following priority regions:
 - Clackamas County, Oregon
 - Jackson County, Oregon
- Respondents are asked below to confirm that the maximum incentives will typically be enough to cover the full cost of the project, and if not, to describe scenarios where this is not likely. In those scenarios, please provide any relevant cost details and specify when these costs might occur. Respondents are urged to consider the Program's objective of no-to-low customer out-of-pocket expenses to enhance overall participation. Contractors are encouraged to propose pricing strategies, such as fixed fees or all-inclusive pricing where applicable and feasible.
- Respondents must offer Energy Trust discounts on these projects as an Instant Incentive to the customer, which requires Contractor to deduct the Energy Trust incentive from the final invoice and submit for payment reimbursement by Energy Trust.
- Offer warranty on all installations.
- Company Client Relations:
 - Be able to respond to a customer's request to schedule a bid walkthrough within 48 business hours.
 - Be able to complete the bid walkthrough within 10 business days of the request or a later date if requested by the customer.
 - Be able to complete the project within six (6) weeks of a customer's signed bid.
- Must be willing to cooperate with ongoing performance evaluation:
 - Program staff and Energy Trust will conduct a continuous evaluation of the company's performance, encompassing various aspects, including but not limited to:
 - Overall customer experience
 - Measure installation quality and adherence to program requirements
 - Punctuality at job sites
 - This continuous performance evaluation will be carried out consistently to ensure the maintenance of high standards and to identify areas for improvement.

B. RFQ Evaluation Criteria

Company Profile (20%):

- Demonstrate excellent professionalism and customer service, which can include one or more of the following:
 - No complaint history with Energy Trust within the past 12 months.
 - Energy Trust trade ally star rating of 4 or higher.
 - Other rating sources may include Google, Yelp, Facebook, etc. Minimum of 10 reviews with 4 stars or higher.
 - If less than 10 reviews are available, the contractor may provide customer references.

- Describe a plan for how they will serve each priority region or demonstrate a strong connection to the service area and experience/interest in serving low-income communities.

Company Experience (45%):

Participating Contractors must demonstrate their experience performing one or more of the following services: HVAC installations (including ductless heat pumps, ducted heat pumps and condensing gas furnaces), heat pump water heater installations, insulation and air sealing, and/or other services. This can be demonstrated through:

- Providing detailed sample scopes of work for projects that demonstrate knowledge of the technology or service and variability of installations.
- Citing experience serving the housing stock in the identified project region(s).
- Describing the approach to providing Customers with options and solutions for commonly observed installation circumstances within the regional housing stock.
- Energy Trust will prioritize companies that offer a range of services to minimize the number of contractor visits and facilitate comprehensive project completions. This may be achieved by a pool of contractors working in coordination to minimize the impact on Customers and the Program. If taking this approach, please specify other trades your company coordinates with.

Additional Considerations (35%):

Respondent submissions will also be evaluated on the following factors:

- Experience and/or interest in serving low-income and priority Customers as part of your company’s mission and a desire to provide equitable access to energy efficiency services.
- One or more of the formal certification from Oregon’s Certification Office for Business Inclusion and Diversity (COBID) ([click here to learn more](#)), Small Business Administration’s (SBA) socioeconomic programs ([click here to learn more](#)), or possesses another certification affirming its status as minority-owned, woman-owned, veteran-owned, or service-disabled veteran-owned business. Respondents are also welcome to self-identify as a minority-, woman- or veteran-owned business.
- Experience or any partnerships that would enable your business to install multiple energy efficiency upgrades and home repairs at a single site.
- Bilingual capabilities; specify the languages spoken and the number of bilingual staff available to support those languages.

Evaluators will assess RFQ responses on the following criteria and select respondents eligible to become Participating Contractors by region:

Criteria	Weight	Description
Company Profile	20%	<ul style="list-style-type: none"> • Demonstrates high professionalism, and operational capacity • Describes a plan for how they will serve the area or has a strong demonstrated connection to the service area and experience/interest in serving low-income communities
Experience	45%	<ul style="list-style-type: none"> • Well-documented experience • Multiple upgrade types and associated repairs offered

Criteria	Weight	Description
Additional Considerations	35%	<ul style="list-style-type: none"> • COVID- and/or SBA-certified (or certified by another entity or self-identify as, and eligible to be, WBE/MBE/VBE-certified) • Bilingual staff and services • Measure installation volume capacity • Enrollment in existing manufactured homes (XMH) free services

7. Governing Provisions

All Respondents are subject to the following governing provisions:

A. Agreement to All Terms

By submitting a response to this RFQ, the Respondent represents that it is authorized to submit a response, all information provided in the response is true and correct, and the Respondent explicitly agrees and accepts the following provisions of this RFQ and all other terms and conditions set forth in this RFQ.

B. Right to Accept or Reject

This RFQ is not an agreement to purchase goods or services. Energy Trust is not bound to enter into a contract to purchase goods or services with any Respondent. Energy Trust reserves the right to modify the terms of this RFQ at any time in its sole discretion. This includes the right to cancel this RFQ at any time. Further, Energy Trust reserves the right to waive any nonconformity in submissions received, to accept or reject any or all of the items in the submission and award any ultimate contract in whole or in part as it is deemed in Energy Trust’s best interest.

C. Ownership of Responses

All materials submitted in response to this RFQ shall become the property of Energy Trust and shall not be returned to the Respondent.

D. Confidentiality

Respondents shall clearly identify those portions of their responses that they do not want revealed to third parties and label such portions as “Confidential Information.” Except as required under law or for regulatory purposes, Energy Trust will maintain confidentiality of such information.

E. Respondent Expenses and Waiver of Claims

Respondents are solely responsible for their own expenses in preparing a response and for any subsequent negotiations. Energy Trust will not be liable to any Respondent for any claims, whether for costs or damages incurred by the Respondent in preparing the response, loss of anticipated profit in connection with any final contract or any other matter whatsoever.

ATTACHMENT A

Request for Qualifications (RFQ)

In-Home Energy Services Priority Regions and Upgrades

2024 Priority Regions:

- [Jackson County, Oregon](#)
- [Clackamas County, Oregon](#)

Priority, No-Cost Upgrades Requirement Summary:

No-cost incentives are available to low income-qualified customers in detached single-family, manufactured homes, and eligible small multifamily properties (up to 4 units) in Oregon serviced by participating Energy Trust utilities (Portland General Electric (PGE), Pacific Power, NW Natural, and Avista) All work must comply with the Residential Specifications Manual and all other Energy Trust requirements .		
Energy Upgrades	Requirements	Maximum Incentives
Ductless Heat Pump (replacing zonal or EFAF)	Must have an HSPF2 of 8.10 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org) and <u>replace electric resistance heat</u> as the residence's primary heating system. Highest capacity indoor head must be installed in the main living space (e.g., living room, great room). Mini-split systems with ducts are permitted if all other requirements are met. One incentive per residence. (HSPF2, EER2 and SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at energytrust.org/eestandards).	1:1 DHP \$4,800
		2:1 DHP \$7,200
Ducted Heat Pump (replacing EFAF)	Must have an HSPF2 7.50 or greater as rated by the Air Conditioning, Heating & Refrigeration Institution (AHRInet.org) and <u>replace electric forced air furnace</u> as the residence's primary heating system. Thermostat lockout of auxiliary heat must be set to 35°F or lower if electric furnace auxiliary heat present. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives. (HSPF2, EER2 and SEER2 requirements apply to equipment manufactured after January 1, 2023. If the equipment installed was manufactured prior to January 1, 2023, verify eligibility at energytrust.org/eestandards).	Single Family \$13,000
		Manufactured Homes \$9,500
Attic Insulation	Existing insulation must be R-11 or less. Must insulate to R-38 or greater or fill cavity if a single-family or small multifamily home.	\$3.00/ Sq Ft
Heat Pump Water Heater	Eligible models must have an EcoPort© and meet Northwest Energy Efficiency Alliance's Advanced Water Heater Specification Tier 3 or 4 to qualify for the incentive. https://neea.org/img/documents/HPWH-qualified-products-list.pdf	\$3,000

Additional Measure Requirement Summary:

<p>Low-cost incentives are available to moderate income-qualified customers in detached single-family, manufactured homes, and eligible small multifamily properties (up to 4 units) in Oregon serviced by participating Energy Trust utilities (Portland General Electric (PGE), Pacific Power, NW Natural, and Avista) All work must comply with the Residential Specifications Manual and all other Energy Trust requirements.</p>		
Energy Upgrades	Requirements	Maximum Incentives
Ductless Heat Pump – Replacing Electric Zonal	Incentive only available for single-family and manufactured homes replacing electric zonal heat (baseboards, wall cadets, etc.) as primary heat source of home. Indoor head must be installed in the main living space (e.g., living room). Bedrooms, bathroom, attics, etc. are not eligible. Must be 1:1 or 2:1 system (restrictions apply to 2:1 installs). HSPF21 8.10 or greater. Replacing natural gas heating does not qualify.	\$2,900
Ductless Heat Pump – Replacing Electric Forced Air Furnace	Incentive only available for single-family and manufactured homes replacing electric forced air furnace as primary heat source of home. Indoor head must be installed in the main living space (e.g., living room). Bedrooms, bathroom, attics, etc. are not eligible. Must be 1:1 or 2:1 system (restrictions apply to 2:1 installs). HSPF21 8.10 or greater. Replacing natural gas heating does not qualify.	\$3,500
Ducted Heat Pump – Replacing Electric Forced Air Furnace	Must replace electric forced air furnace as primary heat source. HSPF21 of 7.50 or greater required. Cannot be combined with other heat pump, heat pump controls or smart thermostat incentives.	\$4,000
Extended Capacity Heat Pump	Not required to replace electric heat. Unit must be a central ducted system and included in Energy Trust’s list of qualifying products . Controls must be set with an auxiliary heat lockout setting when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other Energy Trust heat pump, heat pump controls, or smart thermostat incentives. Only available to residences serviced by PGE or Pacific Power. Indoor Configuration: Eligible systems configurations must include a central ducted system with traditional air handler (slim duct types do not qualify) serving the primary living space of the home.	\$2,000
Extended Capacity Heat Pump – replacing electric forced air furnace	Must replace electric forced air furnace as residence’s primary heating system. Unit must be a central ducted system and included in Energy Trust’s list of qualifying products . Controls must be set with an auxiliary heat lockout setting when available. Heat pump cannot have a backup gas heating system. Cannot be combined with other Energy Trust heat pump, heat pump controls, or smart thermostat incentives. Only available to residences serviced by PGE or Pacific Power. Indoor Configuration: Eligible systems configurations must include a central ducted system with traditional air handler (slim duct types do not qualify) serving the primary living space of the home.	\$6,000
High Efficiency Gas Furnace	95% annual fuel utilization efficiency (AFUE) or greater. Gas furnaces used as backup for high-efficiency heat pumps, also known as hybrid systems, are not eligible. Must replace non-condensing gas furnace or other heating fuel type.	\$2,900
Smart Thermostat – Direct Install	To participate in this offering, connect with your local program representative for more information. Visit www.energytrust.org/thermostat for eligible models. Smart thermostats installed in multifamily units must be heated by gas furnaces. Cannot be combined with heat pump controls incentives.	\$250

Windows		U-Value 0.27 - 0.23. Must replace existing window, glass door or skylight.	\$1.00 per sq ft
		U-Value 0.22 or less. Must replace existing window, glass door or skylight.	\$1.50 per sq ft
Enhanced Windows		U-Value 0.30 or less, depending on heating fuel type and replacement of single pane (any frame) or double pane (metal frame only) windows. Please reach out to inhome@energytrust.org to learn more about your specific incentive rate.	Variable
Wall Insulation	Electric	Existing wall, rim joist, and knee wall insulation must be R-4 or less. Wall insulation is not available for manufactured homes.	Up to \$2.32 per sq ft
	Gas	Exterior Walls must be insulated to R-11 or greater or fill cavity. All heated exterior wall surfaces must be insulated. Rim joists must be insulated to R-15 or greater or fill cavity. Knee walls must be insulated to R-15 or greater for 2x4 cavities or R-21 or greater for 2x6 cavities. Attic insulation must be R-19 or higher in order for knee wall insulation to be eligible for an incentive.	Up to \$3.30 per sq ft
Floor Insulation	Electric	For single-family homes and eligible small multifamily properties. Existing insulation must be R-11 or less. Must insulate to R-30 or greater or fill cavity.	Up to \$1.09 per sq ft
	Gas		Up to \$3.65 per sq ft
Floor Insulation- Manufactured Homes	Electric	For manufactured homes. Existing insulation must be R-11 or less. Must insulate to R-22 or greater or fill cavity.	Up to \$1.45 per sq ft
	Gas		Up to \$1.76 per sq ft

ATTACHMENT B

Request for Qualifications (RFQ) Application

Please use this form to submit a response to this RFQ. For areas requesting a bid, you can enter details into the text box to provide your bid information or attach a separate pdf of individual bids along with this form. All submissions must be sent to InHome@energytrust.org and clearly identify your company name.

Company Profile and Service Area

Company Name	
Company Address	
Company Mailing Address (if different)	
RFQ Point of Contact: Name	
RFQ Point of Contact: Phone Number	
RFQ Point of Contact: Email Address	
Region(s) served by your company:	<input type="checkbox"/> Clackamas County
	<input type="checkbox"/> Jackson County
	<input type="checkbox"/> Other – Please specify:
Current Energy Trust Trade Ally Become a Trade Ally	<input type="checkbox"/> Yes
	<input type="checkbox"/> No, but will enroll by the RFQ submission deadline
Please check all ‘No-Cost’ Priority Upgrades you are interested in installing:	<input type="checkbox"/> Ductless Heat Pump <input type="checkbox"/> Ducted Heat Pump <input type="checkbox"/> Heat Pump Water Heater <input type="checkbox"/> Attic Insulation/ Air Sealing <input type="checkbox"/> Other – Please specify:
Please confirm any additional ‘Low-Cost’ Upgrades you are interested in installing:	<input type="checkbox"/> Extended Capacity Heat Pumps <input type="checkbox"/> Smart Thermostats <input type="checkbox"/> Gas Furnace <input type="checkbox"/> Windows <input type="checkbox"/> Floor Insulation <input type="checkbox"/> Wall Insulation

Organization	
1	Please describe the local structure of your organization (History of business, number of employees, and other resources). Please include your trade ally status and a description of your participation with Energy Trust. Include any other information

	<p>about your company and experience in alignment with Section A of the RFQ response criteria. If you are not currently an Energy Trust trade ally, learn more about how to enroll here.</p> <p>*If you are enrolling as a trade ally during this RFQ process please note this in the box below.</p>
2	<p>Please indicate if you are multilingual or offer administrative multilingual services. If so, in what languages do you offer services?</p>
3	<p>Describe the operational capacity and staffing approaches to responding to customers interest and submitting incentive applications.</p>
4	<p>Please indicate if your business is <u>COBID</u> certified, or possess any certifications that demonstrate your business is one or more of the following; minority-owned, woman-owned, or service disabled veteran-owned. Respondents may also self-identify their business as meeting one or more of these categories.</p>
5	<p>Describe your business' experience and/or interest in serving low-income and priority customers as part of your company's mission and desire to provide equitable access to energy efficiency services.</p>

Demonstrate Experience and Pricing

Heat Pump Water Heater (HPWH)

1	<p>What have been your biggest challenges when installing HPWH to replace electric tank water heaters, if any?</p>
2	<p>How many units could your company/team typically install in one week in the priority region(s)?</p>
3	<p>Do you offer an extended warranty? (outside of manufacturer warranty) If so, what is the cost of the extended warranty? What does the warranty cover?</p>
4	<p>Do you feel the cost threshold of \$3,000 for standard heat pump water heater installations for customers within the specified regions will typically be enough to cover the full cost of the project? This is with the following expectation: the existing water heater is electric, located in the garage, unfinished basement, or utility room, the condensate drain can be located within 10' on same wall, and no ducting or electrical upgrades are needed.</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not, providing specific scenarios and associated costs:</p>
5	<p>Are you willing to offer Energy Trust discounts on these projects as an Instant Incentive to the customer? (These projects will be no-cost to the customer, and this requires the contractor to deduct the Energy Trust incentive for the full amount from the final invoice and submit for payment reimbursement by Energy Trust)</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not:</p>

Ducted Heat Pump (HP)

1	How do you approach customer education on the operation and maintenance of the ducted HP?
2	What would drive you to recommend an extended capacity unit?
3	Do heat pumps always need back-up heat strips? Why or why not?
4	At what PSI do you pressure test? How long do your installers hold it for?
5	How many units could your company/team typically install in one week in the priority region(s)?
6	Do you offer an extended warranty? (outside of manufacturer warranty) If so, what is the cost of the extended warranty? What does the warranty cover?
7	<p>Do you feel the cost threshold of \$9,500 for manufactured homes and \$13,000 for single family installations for standard ducted heat pump installations for customers within the specified regions will typically be enough to cover the full cost of the project? These costs were set with the following expectations: scope to include extended capacity heat pump or backup strip heat, 4" media filter cabinet, programable thermostat, and permits as required and potential minor electrical, minor supply and return plenum modifications and minor duct repair and sealing.</p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No - If you answered 'No', please explain why not, providing specific scenarios and associated costs:</p>
8	Can you provide duct sealing services? And are you enrolled in, or interested in enrolling in, the Manufactured Home Free Services duct sealing promotion? If so, describe how you address existing ductwork in the home (modifications, sealing, leakage tests, external static pressure tests) and what type of startup diagnostics are performed.
9	Can you install bathroom or other exhaust ventilation? Please describe a typical scope of work and any additional costs.

10	Are you willing to offer Energy Trust discounts on these projects as an Instant Incentive to the customer? (These projects will be no-cost to the customer, and this requires the contractor to deduct the Energy Trust incentive for the full amount from the final invoice and submit for payment reimbursement by Energy Trust)
	<input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not:

Ductless Heat Pump (DHP)	
1	How do you approach customer education on the operation and maintenance of the DHP?
2	What would drive you to recommend a single head or multi-head DHP?
3	How do you calculate refrigerant charge?
4	How many units could your company/team typically install in one week in the priority region(s)?
5	Do you offer an extended warranty? (outside of manufacturer warranty) If so, what is the cost of the extended warranty? What does the warranty cover?
6	Do you feel the cost threshold of \$4,800 for 1:1 DHP head and \$7,200 for 2:1 DHP head installations for standard ductless heat pump installations for customers in specified regions will typically be enough to cover the full cost of the project? These costs were set with the following expectations: scope may include additional lineset, line hide, minor electrical and permits as required.

	<input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not, providing specific scenarios and associated costs:
7	<p>Are you willing to offer Energy Trust discounts on these projects as an Instant Incentive to the customer? (These projects will be no-cost to the customer, and this requires the contractor to deduct the Energy Trust incentive for the full amount from the final invoice and submit for payment reimbursement by Energy Trust)</p> <input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not:

Insulation	
1	<p>Do you provide air sealing as part of a typical project? Please describe at typical scope of work and any additional costs.</p>
2	<p>Can you provide duct sealing services? And are you enrolled in, or interested in enrolling in, the Manufactured Home Free Services duct sealing promotion?</p>
3	<p>Can you install bathroom or other exhaust ventilation? Please describe a typical scope of work and any additional costs.</p>
4	<p>How many insulation projects could your company/team typically install in one week in the priority region(s)?</p>
5	<p>Do you offer an extended warranty? (outside of manufacturer warranty) If so, what is the cost of the extended warranty? What does the warranty cover?</p>
6	<p>Do you feel the cost threshold of \$3 per square foot for standard insulation installations for customers within the specified regions will typically be enough to cover the full cost of the project? These costs were set with the following expectations: scope may include standard items to air seal, ventilate and insulate the space as per specification manual. Items that may incur additional costs, and be covered at a higher rate, include: electrical work, water line insulation, insulation removal, drill/fill floorboards, adding venting, creating new access, drywall work,</p>

	<p>duct repairs, mechanical ventilation ducting, pull-down stairs, knob and tube remediation, mold remediation and asbestos remediation.</p>
	<p><input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not, providing specific scenarios and associated costs:</p>
7	<p>Are you willing to offer Energy Trust discounts on these projects as an Instant Incentive to the customer? (These projects will be no-cost to the customer, and this requires the contractor to deduct the Energy Trust incentive for the full amount from the final invoice and submit for payment reimbursement by Energy Trust)</p>
	<p><input type="checkbox"/> Yes <input type="checkbox"/> No - If you answered 'No', please explain why not:</p>

Critical Repairs	
	<p>The IES Program is designed to provide comprehensive projects which may include addressing physical or functional barriers to completing eligible energy upgrades, or issues that pose a health and safety risk. These services may include:</p> <ul style="list-style-type: none"> • Electrical Upgrades/ Repairs • Pest Infestation Control • Installing Mechanical Ventilation (bathroom or kitchen exhaust fans) • Bulk Water Mitigation (gutter cleaning and soil grading) • Passive Ventilation Improvements (installing attic or crawlspace ventilation) • Ductwork Sealing/ Repair • Window or Door Replace/ Repair • Installing Smoke/ Carbon Monoxide Detectors • Minor Roof Repairs (replacing damaged shingles and missing or ineffective flashing)
1	<p>Can your company address any critical repairs in-house, not including services performed through a subcontractor? If so, specify which repairs your company can undertake and provide relevant details.</p>
2	<p>Does your company have established subcontractors capable of addressing critical repairs? If so, specify which repairs your subcontractors can undertake and provide relevant details.</p>
3	<p>Is your company able to offer referrals for addressing critical repairs? If so, please provide details regarding the specific capabilities of your referred contractors.</p>