

**REQUEST FOR QUALIFICATIONS (RFQ) APPLICATION TEMPLATE**

**HVAC Installers for Rental Properties**

Ductless Heat Pump Promotion in Rentals

This template is provided to assist you with your submission response. You are not required to use this form to submit a response for this RFQ. Submissions should go to [communitypartners@energytrust.org](mailto:laura.nicholson@clearesult.com).

# Experience

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| **Company Name** |  |
| **RFQ Point of Contact: Name** |  |
| **RFQ Point of Contact: Phone Number** |  |
| **RFQ Point of Contact: Email Address** |  |

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| Provide a brief **description** of your company (size, years of operation, & trade ally status) and your ability to meet the participating contractor requirements specific in **Section 4** of the RFQ. Please indicate why your company is interested in this promotion. |
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| What is your **experience** designing and installing ductless heat pumps? (e.g. How often do you install these systems? Roughly how many per year? Is this a large, medium, or small volume of your overall projects? What types of properties have you typically served?) |
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| What **marketing or sales strategies** can your company provide that will be relevant to this promotion? Include any strategies including rental industry partners, property management associations, or events. |
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| Please note any **financing** you will be able to offer to landlords or property management companies. |
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| Is your company interested in providing an assessment of other energy upgrade opportunities for the property (e.g. Insulation, Hot Water Heater, etc.) ? |
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# Company Information

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| Please describe the local structure of your organization including project volume, operational capacity, financial stability, number of employees, and other resources. Include any other information about your company that is relevant to this promotion. |
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# Service Area

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| Where is your **office located** and how far are you willing to travel for this promotion? If you typically serve a larger area than you’re willing to serve in this promotion, please indicate that here and let us know why there is a difference. |
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# Customer Education - *Customer education is prioritized in the selection criteria for the promotion.*

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| Tenant behavior can greatly impact the energy savings potential on DHPs. Contractor-led education is crucial to successful installations that provide energy savings over time and reduce contractor callbacks.  What factors result in the most **customer callbacks and issues** for ductless heat pumps? Please describe these issues and what steps you take to address and minimize them. |
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| What information do you think is most **important** for a customer to know about their ductless heat pump?  How do you plan to educate tenants, property managers and/or landlords on the best use, care and maintenance of these systems? e.g. Will you leave information behind? Send reminder emails about recommended settings 6-12 months after installation? Please note who you expect to educate, and how. |
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| Given that these systems will be installed in rental properties, what strategies do you have that will enable new tenants to optimally use their DHP? How would you provide information to property owner and tenants about the most efficient use of DHPs? |
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| How will you **ensure** that the resistance heat will be triggered only when needed as supplemental heat? |
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# System Details

Please provide details for the ductless heat pumps that you are proposing to use for this fixed price promotion. Include all information requested in the matrix below, including **model numbers** of units with matching **nominal capacity,** **HSPF and AHRI numbers**. Please provide your total project cost for each system proposed.

Contractors are encouraged, but not required, to offer systems at each size (9-18K BTU/hr, nominal capacity). Additionally, you may offer more than one system at a given nominal or rated capacity.

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| **Nominal Capacity (Btu/hr)** | **AHRI Rated Capacity at 47º (Btu/hr)** | **Manufacturer/ Outdoor Model #** | **Indoor Model #** | **AHRI #** | **HSPF** | **Proposed Total Project Cost** | **Total Project Cost (Maximum)** |
| 9,000 |  |  |  |  |  |  | $3,750 |
| 12,000 |  |  |  |  |  |  | $3,950 |
| 15,000 |  |  |  |  |  |  | $4,500 |
| 18,000 |  |  |  |  |  |  | $4,500 |

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| Describe your level of comfort with the suggested sizing protocol outlined in ***Section 5*** of the RFQ***.*** If you are not comfortable with the guide as described, provide your proposed sizing methodology with justifications for these choices. Trade allies who do not quote systems at each capacity are required to update the sizing guide or describe in what homes they would not install a system. |
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| Describe the warranties you will be providing for the systems documented above that ensure the long-term durability, operation, and maintenance of each installation. |
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The adders outlined below are additional costs beyond the fixed out-of-pocket costs listed in **Table 1** of the RFQ. A contractor may charge up to $500 total, at the request of a customer, for any combination of adders listed below:

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| **Possible Adders** | **Cost of Extra Service** |
| Wall thermostat in lieu of handheld remote |  |
| 2-year maintenance agreement |  |
| Baseboard removal |  |
| Additional line set and line hide |  |
| Additional circuit added to electric panel |  |
| Outdoor service plug installation |  |
| Required commercial permit costs\* |  |
| “Sweat Equity” installation cost reduction *(Optional)* |  |

\* Dependent on building type and municipality; itemized invoice required to claim this adder. Applicable amount is the delta between a residential and commercial permit for the project in this municipality.

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| Please include any notes you would like to share about any of the adders listed. If applicable, please include a description of your baseboard removal package or services. Do you ever allow owner or customer to take on a portion of the work in order to reduce overall cost? Please describe what work you would allow the owner or customer to perform. |
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| If not listed above, are there other additional lower cost services you would like to offer or provide that benefit rental owners, property managers, or tenants as part of this promotion? |
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