



This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of—or in conjunction with—the submission of these data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in these data if it is obtained from another source without restriction. The data subject to this restriction are contained in this volume and its appendices and attachments.

September 28th, 2026

Request for Proposal

**HVAC Assessment & Project Delivery
Services**

**Southern Maryland Electric
Cooperative (SMECO)**

**Home Energy Improvement Program
(HEIP)**



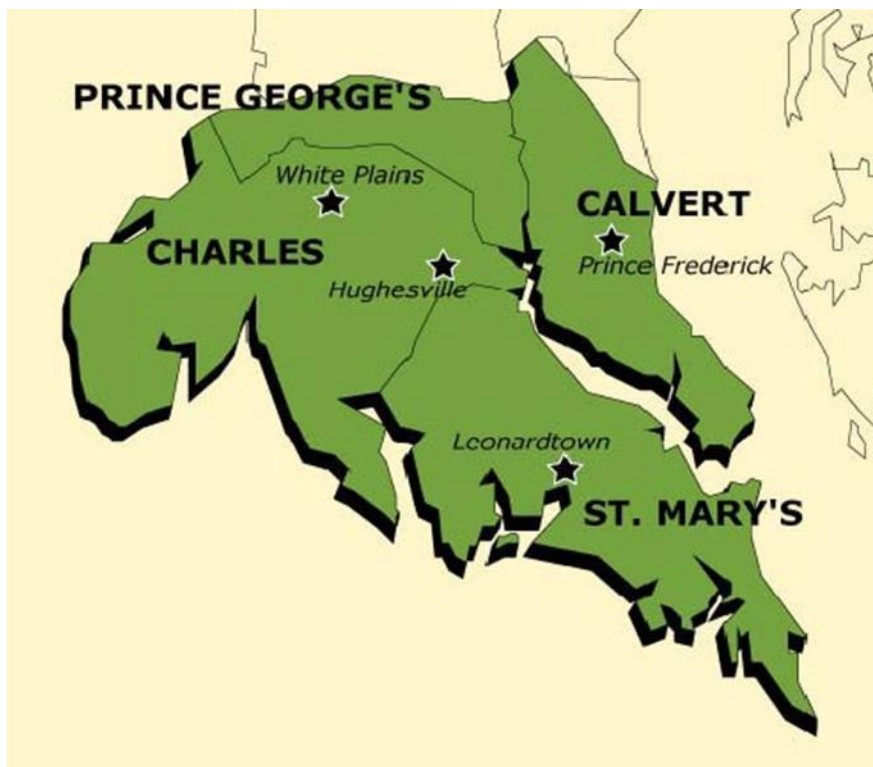
Contents

1.0 Introduction	4
2.0 Minimum Qualification & Eligibility.....	5
3.0 Scope of Work	6
3.1 Overview.....	6
3.2 Program Orientation Training.....	6
3.3 Initial Site Visit (Audit) and HVAC Tune-up.....	6
3.4 Installation Services Project Reporting.....	9
4.0 Proposal Form.....	10
5.0 Proposal Evaluation.....	11
6.0 Deadlines & Submittal Instructions.....	11
7.0 For Further Information	11
8.0 Miscellaneous	11
8.1 Contract Term	11
8.2 Confidentiality	12
8.3 Regulatory Scrutiny of Work.....	12
8.4 Termination Right of ICF.....	12

1.0 Introduction

Southern Maryland Electric Cooperative (SMECO) is a customer-owned electric cooperative providing electricity to over 154,000 services in southern Prince George's County, and in Charles County, St. Mary's County, and all but in the northeast portion of Calvert County. The map below illustrates SMECO's service territory.

SMECO Service Territory



SMECO has implemented a suite of energy efficiency programs to provide residential and commercial customers with energy and cost savings opportunities. SMECO has selected ICF Resources, LLC, a subsidiary of ICF, to assist in program design, implementation, and management. ICF has longstanding experience in delivering energy efficiency programs for numerous utilities throughout the United States, both through its own staff and through subcontractors.

The purpose of this Request for Proposal (RFP) is to select companies with the qualifications necessary to provide HVAC services to SMECO customers participating in the Home Energy Improvement Program.

SMECO and ICF encourage Minority Business Enterprises (MBE's), service-disabled veterans, and women-owned businesses to participate in this opportunity as Diverse Business Enterprises (DBE's). Respondents must provide documentation of such status in order to be considered a DBE. It is our policy that DBEs shall have the maximum practicable opportunity to participate in the performance of contracts. However, this policy shall not be used to exclude qualified non-DBEs from participating in this opportunity. Selected companies are encouraged to carry out this policy in the award of subcontracts to the fullest extent consistent with the efficient performance of this contract.

From responses to this RFP, ICF will select a list of on-call subcontractors who will comprise a preferred vendor listing specifically to support this SOW under ICF's prime contract with SMECO. ICF will enter

into a master ordering agreement with each successful offeror which will serve as the vehicle for suppliers to perform any HEIP services within the SMECO service territory.

The successful offeror will receive training from ICF on the delivery of HEIP services and subcontractor expectations and will be required to follow all program procedures and policies. HEIP subcontractors shall use only marketing and informational materials that are provided or approved by ICF and SMECO. Subcontractors shall be evaluated based on the quality and timeliness of their service and program reporting.

2.0 Minimum Qualification & Eligibility

ICF is looking for companies that possess the knowledge and experience to analyze, repair, and upgrade a home's HVAC system, while understanding and integrating overall home performance principles. Prospective HVAC subcontractors must have experience delivering all aspects of HVAC services, replacements and repair, and hold all necessary licensing requirements for the state of Maryland. Companies with staff certified as Building Performance Institute (BPI) Building Analysts or Energy Auditors, Envelope, AC & Heat Pump, and/or Heating Professionals are preferred.

In addition to their technical skills, HVAC subcontractors must be able to coordinate directly with SMECO's HEIP program team to schedule appointments, evaluate customers' existing heating and cooling equipment, and clearly present the various options of repair and/or replacement of HVAC systems. The subcontractor is expected to work directly with SMECO's HEIP Energy Advisors to develop a prioritized plan of energy savings opportunities in a customer's home, as applicable.

Subcontractors must hold a Maryland Board of Heating, Ventilation, Air Conditioning and Refrigeration Contractors (HVAC/R) license and provide a 1-year warranty minimum to cover all aspects of work conducted through HEIP, as well as meet ICF insurance requirements that are outlined in Attachment A, Section 2.

Upon acceptance of a 2026 subcontract for SMECO's HEIP project HVAC services, the subcontractor will immediately be directed to provide ICF with a .jpeg headshot of each field technician taken on a plain white background to create a SMECO-branded badge. The subcontractor will also be required to provide additional information regarding each HEIP installer which may include social security number, background check information, and other personal information as directed.

3.0 Scope of Work

3.1 Overview

Subcontractors shall provide project HVAC services for the SMECO HEIP Program.

The delivery of the HEIP is a two-step process. First, a SMECO HEIP Energy Advisor (ICF) will provide customers with a detailed analysis of their energy consumption through an initial visual inspection of the home, inclusive of direct installation of low-cost baseload measures. During HVAC services visit, if any system issues are discovered during the scope of work associated with tune-up services, HVAC subcontractor will provide notification to the customer and must notate within the program's submission software. The HVAC subcontractor also has permission to deny service due to preexisting issues with HVAC and/or electrical systems, as well as an unsafe environment. The HVAC subcontractor may return to complete service after these issues have been fixed.

SMECO HEIP Energy Advisors may identify opportunities for system replacement(s) during the initial HEIP assessment. Energy Advisors will communicate recommended upgrades and eligible SMECO rebate amounts to HEIP participants. Upon customer acceptance of any work, the HVAC subcontractor will schedule and coordinate any system replacements in coordination with the HEIP program. (HVAC Only jobs are eligible for HEIP rebates, pursuant to requirements outlined in section 3.4.) The HEIP program rebate will be removed from the total cost of the project installation services at the time of HVAC subcontractor billing to the customer and will be paid directly to the subcontractor upon ICF review and approval of the reported project.

3.2 Program Orientation Training

SMECO's selected HVAC subcontractor shall make all involved staff available, as appropriate, for necessary orientation training on program policies, procedures and paperwork. This includes the following elements:

- **SharePoint:** Cloud-based software used with HEIP staff for securely sharing files with personally-identifiable information (PII)
- **HVAC Scheduling Tool:** Specified access will be granted to an ICF provided scheduling tool which will allow direct and simultaneous access to customer leads.
- **Sightline Mobile/MeasureQuick:** Program mobile data collection application, which will serve as the reporting tool for completed HEIP HVAC projects.
- **Program inspection and reporting requirements and paperwork,** including final project workscope and any other project specific documentation.
- **Program Quality Assurance** policies, procedures and forms.
- **Ongoing** systems and/or in-field tools trainings (as applicable) as SMECO's HEIP program coordination team evaluates opportunities to further streamline program processes and reporting efforts.

3.3 Initial Site Visit (Audit), HVAC Tune-up and Smart Thermostat Services

3.3.1 Scheduling

The HEIP process begins with the customer scheduling their HVAC Services either through the SMECO Call Center, HEIP online scheduling assistant, or directly with a HEIP Energy Advisor or a HVAC Subcontractor.

Customers will be vetted for HVAC tune-up and system evaluation and/or smart thermostat measure interest at the time of scheduling. Customers that express interest in one or both measures will be transferred to HVAC subcontractor based on assigned territory areas. HVAC subcontractor is expected to update the customer's work order with the following contact status information, as applicable –

- Status update (i.e. lead received, lead contacted, scheduled, completed, etc.)
- Initial and subsequent contact efforts, including voicemail/email detail and notes
 - Customer should be contacted within 2 business days
- HVAC services appointment scheduling
 - Scheduling windows should be within 4 weeks of contact (when delay is not due to program temperature requirements)
 - Feasibility constraints may prevent the 4-week window
 - ICF can readjust lead distribution if this 4-week window is not met

Upon approval, selected HEIP HVAC subcontractors will be encouraged to extend the program offering to self-generated leads. All self-generated leads must be entered into the lead tracker system for eligibility validation. It is expected that program-generated (supplied) leads will receive priority in scheduling efforts to any self-generated lead opportunities.

The HEIP HVAC subcontractor will be granted service territory area within the SMECO region based on capacity and performance, in addition to the subcontractor's preference for service territory. This zip code service territory will provide the SMECO generated HVAC leads for tune-ups, thermostats, and system replacements recommended by the SMECO Energy Advisor. Service territory areas will be reevaluated periodically based on subcontractor's diligence in updating statuses, time to schedule, length of time between scheduling and completion, member escalations and feedback, tune-up and thermostat submission accuracy, and number of qualifying HVAC only equipment replacements.

3.3.2 Smart Thermostat Inventory Management

Selected HVAC subcontractor will be responsible for the purchase and management of smart thermostat measure inventory. ICF does not have exclusive measure pricing for the thermostat installed by the program (FocusPro S200 3H/2C **ONLY**) and contractors may source these measures from a distributor of their choosing.

3.3.3 Compensation

Selected HVAC subcontractor will be paid after submitting all documentation and receiving approval within ICF's Application Portal. The confirmed compensation rates from SMECO for 2027 are:

- \$260 per HVAC tune-up
- \$100 per thermostat
- \$165 per thermostat install*

All documentation must be uploaded and correct to receive payment. Payment can only be received for services performed on eligible Residential Rate Codes.

**The previous rate of \$150 per thermostat install has been increased to reflect the additional time needed in the home to facilitate the connectivity portion of the installation which is now strictly required for the DR component.*

3.3.4 HVAC Services Overview

In coordination with SMECO's Home Energy Improvement Program, HVAC subcontractor will complete the following tasks:

ASHP & CAC HVAC Tune-up Requirements:

1. Verify equipment is functional and qualifies for tune-up.
2. Have the customer sign the program Terms and Conditions.
3. Take "test-in" data (system diagnostic).
4. Clean Evaporator coil (if accessible)
5. Brush and vacuum blower motor.
6. Clean Condenser coil.
7. Check Condenser electrical components.
8. Replace air handler filter if supplied.
9. Clean condensate line, if accessible.
10. Check electrical connections in indoor units (AHU or Furnace).
11. Add up to 1lb of refrigerant when appropriate (excluding R-22).
12. Take "test-out" data (system diagnostic - using measureQuick and uploading to Sightline Mobile).

Smart Thermostat Installation

- Installation of program-approved smart thermostat direct install measure, as applicable, including –
 - Vetting customer regarding thermostat unit type selection and system compatibility
 - With the introduction of a more cost-effective thermostat, there will no longer be a cost-collection/co-pay aspect for this program.
 - When required for the installation of the program-provided smart thermostat, the program does require contractors to install a c-wire adapter kit.
 - Due to the cost structure of the program's reimbursement of the thermostat measure, the program does not re-imburse the contractor for the cost of the c-wire adapter kit, nor its installation.
 - Final installation reporting including model and serial-number detail data capture with photos, as applicable. For application processing:
 - The correct heating fuel type must be entered accurately.
 - The exact serial number must be entered accurately.
 - Subcontractor is required to setup and configure thermostat and connect to Wi-Fi and educate the member on the energy saving features of the device.
 - Subcontractors are also expected to educate the members on the pre-enrollment of the thermostat in the SmartTemp program, as well as the benefits and operations of that program.
 - If customer denies initial setup, programming of schedule, and use of mobile application, then education must be left behind and the member must be advised that the device will not be enrolled in SmartTemp until it is connected to Wi-Fi via the OEM application.

Post-Service Wrap Up Conversation

- Provide overview of completed services to homeowner/resident in a wrap-up conversation
 - Condition of existing HVAC equipment
 - Steps taken during the tune-up
 - Recommended services, repairs, or upgrades to HVAC system

- Leave behind checklist
 - SmartTemp Educational leave-behind
- Overall evaluation of system for early retirement recommendations

Resolve Complaints and Issues Through a Member Escalation Tracking and Resolution System

- Put or have in place a tracking and resolution system for HEIP member escalations and incidents.
- Thoroughly document the escalation and incident and immediately respond to and rectify member complaints or damage/issues arising from HVAC Tune-up or Smart Thermostat installation.
- Let ICF know about any callbacks and follow the bullets below to receive a \$100 callback fee
 - Prior to dispatching a technician, send email to SMECOHEIP@icf.com with program staff CC'd to include:
 - FULL address of the member
 - Quick description of the problem
 - Acknowledgment that the customer understands that a company service charge may apply if the service call is not a thermostat or tune-up issue
 - After the service call, send another email to SMECOHEIP@icf.com with your HEIP program staff CC'd to include:
 - FULL matching address of member sent in the first email
 - Diagnostics that were performed on the old thermostat and summary of resolution e.g.: the thermostat was blank and a new Honeywell Thermostat was installed in its place
 - Picture or written serial number of old thermostat Serial Number
 - Confirm that the HVAC system is functioning and temperature readings are correct.
 - If the reason for callback was not related to HEIP tune-up or thermostat, the HVAC subcontractor can charge the customer directly and will not submit a \$100 callback fee to ICF.

3.4 HVAC Installation Project Reporting

If HVAC upgrades are approved by the homeowner, the subcontractor will schedule installations directly with the homeowner. Upon completion of work, customers will pay HVAC subcontractors directly, less any applicable HEIP rebate.

3.4.1 Rebates for HVAC Upgrades

For HVAC upgrades that are completed in conjunction with other weatherization improvements, the HVAC subcontractor is encouraged to coordinate proposals, scheduling, and the submission of rebate application materials with the SMECO HEIP authorized installation contractor.

SMECO HEIP allows the submission of HVAC Only jobs. For HVAC Only jobs to qualify for SMECO HEIP rebates, the below requirements will need to be met:

- Confirm the rebate amount with SMECO HEIP program staff
 - System must be at least 16.9 SEER2 and 8.2 HSPF2 (3.6 COP) to qualify.
- Seal all accessible duct lines using approved materials.
- Conduct post-TESP (Total External Static Pressure) testing to confirm the unit falls within the manufacturer's recommended levels.
 - Take steps to alleviate higher than acceptable TESP levels before submission of the rebate materials.

In addition to pure HVAC replacements, SMECO HEIP also allows the submission of Heat Pump Water Heater only and Aeroseal-only Jobs. For Heat Pump Water Heater only jobs to qualify for SMECO HEIP rebates, the below requirements will need to be met:

- Confirm the rebate amount with SMECO HEIP program staff
- Provide at least 1,000 cubic feet of air space around the water heater.
 - Direct ducting or louvered access can be installed if the 1,000 cubic feet of air space cannot be achieved naturally.
- Air passing over the evaporator can be exhausted to the room or outdoors.

For Aeroseal-only jobs to qualify for SMECO HEIP rebates, the requirements below will need to be met:

- Confirm the rebate amount with SMECO HEIP program staff
- Provide Test-in and Test-out readings for the below metrics:
 - Duct static pressure at air handler (inches water column).
 - Duct leakage to outside
 - Total duct leakage

Within five (5) business days of completing a project, HVAC subcontractor will provide all project related forms and other required documentation to the HEIP coordination team, including invoice documentation, photos of installed system and AHRI efficiency certification. Providing all required documents will constitute an assertion that the project is completed, and payment is requested. Final program documentation must be submitted on a consistent and timely basis. ICF will review submitted records for completeness and compliance with program guidelines and initiate payment upon approving the project as complete. If ICF cannot approve the project as complete, ICF will notify HVAC subcontractors and request additional information or request corrections.

4.0 Proposal Form

Companies wishing to participate as a SMECO HEIP HVAC subcontractor must submit a response describing their expertise to provide required services. Each section is required; **incomplete or late responses will not be considered**. Responses should include the following items:

Proposal Part 1: Cover Sheet (Attachment A)

All proposals must include the attached application form as a cover sheet.

Proposal Part 2: Questionnaire (Attachment B)

Please include a response to all questions in the questionnaire. This questionnaire is designed to allow subcontractors the opportunity to demonstrate their capabilities and specific experience.

Proposal Part 3: Provide Qualifications of Key Staff

A standard resume including professional experience, publications, membership in professional organizations, education, certifications, training, and any other relevant experience should be attached. Before the contract may be signed, it will be mandatory for all staff that will be performing HVAC diagnostic and installation services on behalf of SMECO HEIP to submit required information and a badge photo that meets all SMECO photo requirements, as follows:

- Photo must be a **clear** headshot, taken in front of a white background,
- Maintain professional look and quality (avoid hats, erroneous accessories, etc.),
- Save file as a .jpeg titled, "LastName, FirstName_COMPANYNAME"



Badges can only be worn while performing HEIP installation services. Badges must be returned if an employee is terminated.

Proposal Part 4: Professional References

A minimum of three professional references directly related to the delivery of residential HVAC services.

Proposal Part 5: Proposed Pricing (Attachment C)

Provide pricing for delivery of selected items covered by SMECO HEIP in Attachment C. Pricing shall be reflective of materials, labor, taxes, travel time, tools and discounts for volume. The responses in Attachment C will provide the basis for comparative evaluation of pricing and shall become part of a more comprehensive pricing list, which will be negotiated with each selected Subcontractor, and the resulting universal Price List will be attached to the resulting Subcontract.

5.0 Proposal Evaluation

Each proposal will be graded based on the following categories:

- Scope of Service: The selected firms must demonstrate a clear understanding of the services being solicited through this RFP. This also takes into consideration the firm's potential MBE/DBE status and appointment availability.
- Pricing: The selected firms must include competitive rates for performing HEIP HVAC diagnostic and installation services.
- Completion/Timeliness: The selected firms shall submit a complete and thorough proposal through the Procurement Portal by the deadline provided by ICF.
- Customer Service: The selected firms shall have demonstrated success in providing exceptional customer service while delivering installation services and reporting, including providing results and examples to ICF.
- Staffing Qualifications: Firms shall display experienced staff, resources, capacity in providing HVAC diagnostic and installation services, and licensing requirements as outlined in Section 2.0 of this RFP. This also includes evaluations based on administrative staff and experience.

6.0 Deadlines & Submittal Instructions

Responses must be delivered by 5:00 PM (Eastern) on October 9th, 2026. Please submit your completed response via the online procurement portal only by the deadline at this URL:

<https://eeprourementportal.icfwebservices.com/>.

The document must be saved and uploaded in the following format:

CompanyName Utility 2026RFP HEIP HVAC.

*Provide your Responses to this RFP on the separate attached Word Document named:

SMECO HEIP HVAC Services Response Form Attachment A - B 2026

7.0 For Further Information

Questions may be submitted on the procurement portal by 5:00 PM (Eastern) on October 2nd, 2026. ICF cannot guarantee a response to questions received after that date and time. Any questions submitted will be sent to everyone who is registered as a respondent on the procurement portal.

8.0 Miscellaneous

8.1 Contract Term

The SMECO HEIP Subcontract that results from this RFP will be for services no earlier than January 1, 2027 and will remain contingent on the sign-date of agreement, through December 31, 2027.

8.2 Confidentiality

ICF and SMECO will supply the subcontractor with confidential customer information. All such information is the exclusive property of SMECO. The subcontractor shall not sell, barter or exchange any information provided for this Program, including but not limited to the customer information, in perpetuity. The subcontractor shall not copy customer information without prior written consent provided by ICF and SMECO.

The subcontractor, its employees, and its agents shall not use the customer information or the delivery of the Program for the generation of leads for sales of any other services or products the subcontractor may offer in perpetuity.

Bidders' responses and pricing for this solicitation will be treated as confidential.

8.3 Regulatory Scrutiny of Work

The subcontractor should understand that their documents and work will become part of a public process involving incentive regulation and cost recovery and be reviewed and scrutinized by SMECO and ICF staff, by independent consultants, intervener groups and regulatory staff. All data developed by the subcontractor under these contracts are the property of SMECO and ICF, and electronic files containing all data shall be submitted to ICF as per the subcontract agreement.

8.4 Termination Right of ICF

ICF may terminate this Agreement at any time upon five days written notice to subcontractor for any reason. ICF shall **not** be responsible for reimbursing the subcontractor for any cost incurred in reliance on the expectation that the Agreement would remain in effect throughout the end of the term.

8.5 Termination Right of Contractor

The subcontractor may terminate this Agreement upon 30 days advance written notice to ICF.

8.6 Minority/Diverse Business Enterprises (MBE/DBE)

ICF encourages minority, veterans, and women-owned businesses to participate in this opportunity. Please provide documentation of such status to be considered as an MBE/DBE.

**Provide your Responses to this RFP on the
separate attached Word Document named:**

**SMECO HEIP HVAC Services Response Form
Attachment A - B 2026**

Responses are due October 9th, 2026

