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SOUTHEAST ALASKA REGIONAL DEVELOPMENT ORGANIZATION

Request For Proposals

Professional Installation of Heat Pumps in Low-Income Homes

Issued by: Southeast Conference

Issue Date: July 3, 2025

Proposal Due Date: July 23, 2025, or until need is filled

Project Budget: Up to \$3,000,000 in total funds, multiple contracts awarded

Project Location: 43 coastal communities from SE Alaska to Kodiak

1. Summary

Southeast Conference (SEC) is seeking proposals from qualified local contractors to provide and install residential energy-efficient heat pump systems, as part of the **'Accelerating Clean Energy Saving (ACES)'** Climate Pollution Reduction Grant awarded to SEC by the Environmental Protection Agency (EPA). This project's aim is to reduce energy costs and improve comfort in low-income households by converting primary residential heat from heating oil, natural gas, propane or wood to an electric cold climate appropriate heat pump. The selected contractor(s) will be responsible for managing all aspects of the installation for the assigned households including travel, equipment selection, purchase, and delivery, balance of systems, labor, clean up and end of project reporting to SEC in accordance with the requirements outlined in this RFP and necessary for grant reporting. The households receiving heat pump assistance will be pre-screened for eligibility and a preliminary energy assessment will be conducted by Alaska Heat Smart, the project's implementation partner, prior to the assignment of a contractor. The contractor(s) selected will receive the grant money directly from SEC for these assigned low-income installations, instead of the grant being a reimbursed award to the homeowners as it is for middle and high incomes.

2. Introduction and Intent

- 2.1. Goal:** For SEC to pay contractors directly, through reimbursement and the use of a deliverables-based contract, in order to alleviate this cost burden for low-income households. The contractor(s) will determine and install appropriately sized and located heat pump systems in approximately 600 (potential for more) low-income homes located near coastal communities in southeastern and southcentral Alaska. Participating contractors will also be near these coastal areas, to be dispatched to the 43 communities. The purpose of the project is to reduce greenhouse gas emissions and dependence on delivered fuels, reduce energy costs, support jobs, and improve indoor air quality, safety and comfort for residents.



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- 2.2. **Funding Source:** up to \$3,000,000, or 10% of designated funds, from the FY2025 SEC awarded - 66.046 Climate Pollution Reduction Grant, governed under 2 CFR 200, 2 CFR 1500 and 40 CFR 33. Assistance agreement #84101201
- 2.3. **Process/ Vision:** The eligible low-income homes are located in the pre-designated communities ([Community and Income Eligibility – ACES](#)). Low-income is defined by household income below 80% of the Area Median Income (AMI), and set annually by the Department of Housing and Urban Development [Income Limits | HUD USER](#). Alaska Heat Smart will determine eligibility and low-income verification, and then households will receive a no-cost energy assessment. If a heat pump is deemed appropriate by the assessment team and all criteria are satisfied, SEC will assign a contractor, who is identified through this RFP, and assigned by proximity to the job site, preferred work locations, and on a rolling basis. The contractor assigned will receive the energy assessment, meet with the customer, and provide a quote/options for customer review. After the quote is agreed upon, the assigned contractor will manage the installation and commissioning process. After commissioning, the contractor will ensure warranty info is submitted, pictures are taken, and all required documentation for work performed is submitted through a portal and/or via email to the SEC/AHS team for reimbursement. SEC will direct deposit funds to the contractor, up to \$8,500 per household. Quotes/work performed over this max grant amount will be paid by the homeowners. SEC will use the information and ideas submitted through this RFP process to further clarify and detail out this vision.
- 2.4. **Deadline for Receipt of Proposals:** Proposals will be accepted until July 23, 2025, or until the need is filled.
- 2.5. **Required Review and Questions Submission:** Offerors should read this solicitation for any questions, objections or concerns. Comments to the contents of this RFP should be submitted to the procurement officer.
Deadline to receive questions: July 16, 2025
Procurement Officer: Jessie Huff – jessie@seconference.org
- 2.6. **Amendments:** After the deadline for receipt of proposals, if there remains a need for a substantial clarification or material change in the RFP an amendment will be issued. SEC will email the amendment to the offerors, and a new date or time will be established, providing offerors with ample response time.
- 2.7. **Standard Contract Provisions:** This RFP does not obligate SEC to perform until a contract is signed and approved by the parties. If approved, the contract is effective



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from the date of approval by SEC. SEC shall not be responsible for work done, even in good faith, prior to approval of the contract, unless specific provisions are made in the contract.

SEC reserves the right to include additional terms and conditions during the contract negotiations and based on feedback. These terms and conditions must be within the scope of the original RFP and contract documents, and will be limited to clarification, definition, administrative, legal, and cost requirements.

All significant contractor project team members shall be identified in the proposal. SEC reserves the right to approve or disapprove any successful respondent's project team members (or change in team members) whose participation in the project is specifically offered in the respondent's proposal. This is to ensure that people with vital experience and skills are not arbitrarily removed from the project by the contractor.

Any change in contractor personnel shall be submitted in writing to SEC for review and approval before the change is made. Contractor personnel changes which impact the work in any manner may be a cause for SEC to terminate the contract.

The successful contractor shall have the right to subcontract a portion of the work. All respondents must list in their proposals the names, credentials, and contact information of subcontractors and the type and percentage of work they will be providing.

All subcontractors must be approved by SEC prior to the contract award. If during the term of the contract the prime contractor finds it necessary to replace subcontractors identified in the original proposal, SEC will consider such subsequent assignments or replacements, provided however, that ten (10) days written notice is given by the contractor and written approval is obtained from SEC prior to commencement of any work by the recommended substitute subcontractor.

2.8. Schedule:

Activity	Time	Date
RFP Issue Date		July 3, 2025
Deadline for questions	4:30 pm	July 16, 2025
Due Date	4:30 pm	July 23, 2025
Anticipated Evaluations		Week of July 21 & 28



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Anticipated Notice of Intent to Award		August 2025
Anticipated Contracts Issued		Late August 2025
Work to Commence		September 2025

2.9. Submission instructions: Offerors may only submit one proposal for evaluation. Proposals that offer something different than what is asked for may be rejected.

Please submit proposals by email to info@seconference.org, and jessie@seconference.org with all necessary materials attached in PDF format. Please do not submit more than seven (7) total PDF documents. Between one (1) and seven (7) PDFs are acceptable. Images should be placed inside the PDF document not attached as jpg files.

2.10. Prior Experience / Qualifications / Confidence Requirements: In order for offers to be considered responsive, the offeror must meet and must clearly show within their proposal the following minimum experience requirements and expertise:

- a. Certificate of Insurance
- b. State of Alaska Business License
- c. At least one member of the installation team must have either an EPA 608 Certificate, Type II or Universal Cert.
- d. Specialty Licenses – at least one of these must also be held by Offeror, as is appropriate and required for the location of the installation and type of heat pump used:
 - i. Heat pump installers: General Contractor, Mechanical Administrator, Residential Contractor, or Handyman Contractor license
 - ii. Electricians: Electrical Administrator’s License
 - iii. If the heat pump installation includes the alteration of domestic water lines a plumbing certificate of fitness (COF) or PJ is required, or a qualified sub-contractor must be used.
- e. Have completed at least 20 successful heat pump installations/wirings in the past 5 years.
- f. Provide two references that can attest to successful installations.
- g. Provide at least 2 photo(s) of completed work specific to heat pump installation
- h. Demonstrate that the Offeror has read and fully understands and will meet the ACES Eligible Equipment Requirements, located here: [Contractor Support – ACES](#) and [Heat Pump Equipment and Central ACs Key Product Criteria | ENERGY STAR](#) and will also insure a whole house surge protector or a heat pump surge protector will be installed, a drain pan heater is installed,



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and that heat pumps must be protected and registered under the manufacturer's parts warranty.

- i. Provide confidence that the Offeror understands reporting and reimbursement paperwork will be required, and that in the low-income program many of these responsibilities will fall on the Offeror, because the grant will be directly reimbursed to the Offeror instead of the household. See [Contractor Support – ACES](#) and Reporting Requirements.

An offeror's failure to meet these minimum requirements will cause their proposal to be considered non-responsive and rejected.

3. Scope of Work

The contractor will be responsible for the following tasks:

3.1. **Work with the project team to schedule customers in a timely manner and to minimize travel costs when possible:**

3.1.1. Clear and honest communication will be key.

3.1.2. If travel to a community is required, preapproval and coordination is mandatory to save money by scheduling installations in pairs or groupings.

3.2. **Site Assessment, Evaluation and Project Management:**

3.2.1. Review the energy assessment provided by AHS and perform any additional inquiry/consultations to determine the appropriate make/model and a well-sited location for the heat pump(s).

3.2.2. Evaluate the information in the provided energy assessment regarding the existing heating system and ensure feasibility and compatibility with proposed location of installation, historic use and any relevant concern.

3.2.3. Identify any required upgrades such as electrical, ductwork, drainage as part of the upgrade requirement. Determine if subcontractors are needed and approved by SEC.

3.2.4. Provide a quote to the customer, and SEC/AHS, that includes all costs. If the costs are higher than the grant amount, ensure the customer wishes to move forward and can commit to the costs before proceeding.

3.3. **Permitting and Compliance:**

3.3.1. Obtain any necessary permits for the installation and comply with all relevant codes, standards, and regulations.

3.3.2. Ensure compliance with all energy efficiency standards, including those related to the warranty will be met.



- 3.3.3. Ensure approval of the units' location indoors and outdoors as needed by property owners.
- 3.4. **Installation:**
 - 3.4.1. Ensure proper dedicated circuit, appropriately sized wiring, amperage, and breaker size for continuous loads, meaning the 80% rule from the NEC applies, adhering to NEC and local codes. If needed, install a disconnect switch near the outdoor unit.
 - 3.4.2. Supply and install the Energy Star rated heat pump systems per manufacturer instructions, in order to achieve or exceed installation standards.
 - 3.4.3. Ensure proper sizing and placement of heat pump systems to ensure optimal performance.
 - 3.4.4. Install any necessary components, such as air handlers, ductwork, appropriately located thermostats, a drain pan heater, and surge protection, with the goal to successfully integrate the heat pump into the home's current heating system and historic use pattern.
 - 3.4.5. Ensure proper refrigerant management.
- 3.5. **Equipment Testing and Verification:**
 - 3.5.1. Perform thorough commissioning to ensure the heat pump is functioning properly, is configured properly and meets performance specifications.
 - 3.5.2. Verify that all work is completed in accordance with contract specifications, safety standards and comply with national energy efficiency standards, electrical codes, local building codes, and manufacturer's installation instructions.
- 3.6. **Customer Education and Support:**
 - 3.6.1. Provide training to residents on the operation and maintenance of the new heat pump system. Help the customer understand how to use the heat pump to gain optimum efficiency.
 - 3.6.2. Offer support for any issues or questions regarding the post-installation system for a specified period (e.g., 6 months).
- 3.7. **Documentation and Reporting:**
 - 3.7.1. Submit all required documentation, including permits, inspection reports, and warranty information for each installation, as needed, and appropriate to the appropriate authority.



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- 3.7.2. Submit to SEC and/or project partners the to-be-provided checklists forms and required reimbursement items for each household project. Including items such as photos, and a detailed invoice.
- 3.7.3. Provide quarterly progress reports including completion of installations, number of homes on waitlist and estimated install dates, any delays, and any issues encountered during installation or scheduling.
- 3.7.4. Help SEC and Project team to identify any households that would make good success stories.

4. Proposal Preparation Instruction

Interested offerors must submit the following information as part of their proposal. Please limit all attachments to PDF files and a maximum of seven (7) attachments.

- 4.1. **Cover letter or title page** with name, address, telephone and fax number/email, date of proposal, and name of contact.
- 4.2. **Company Overview:**
 - 4.2.1. A brief description of the company, including a list of project team, summary of experience of the project team - including subcontractors and history of working together.
 - 4.2.2. Experience working with low-income communities, reimbursable grant funding, in Alaska communities, or any similar projects or RFPs awarded.
- 4.3. **Qualifications and Certifications:**
 - 4.3.1. Certificate of Insurance
 - 4.3.2. State of Alaska Business License
 - 4.3.3. Provide verification of the following – At least one member of the installation team must have at least one of the following:
EPA 608 Certificate, Type II or Universal Cert.
Additionally, at least one of these licenses must be held by Offeror:
 - Heat pump installers: General Contractor, Mechanical Administrator, Residential Contractor, or Handyman Contractor
 - Electricians: Electrical Administrator’s License
 - If the heat pump installation includes the alteration of domestic water lines a plumbing certificate of fitness (COF) or PJ is required, or a qualified sub-contractor must be used.
 - 4.3.4. Attest to having completed at least 20 successful heat pump installations/wirings in the past 5 years. Relate past work performed to the team members.



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- 4.3.5. Provide at least two (2) references from previous clients or projects where similar services were provided. References should include contact information and a brief description of the project.
- 4.3.6. Provide at least 2 photo(s) of completed heat pump installations.
- 4.3.7. Provide confidence that the Offeror has read and fully understands the ACES Eligible Equipment Requirements, located here: [Heat Pump Equipment and Central ACs Key Product Criteria | ENERGY STAR](#) and will also ensure a whole-house surge protector or a heat pump surge protector will be installed, a drain pan heater is installed, and that heat pumps must be protected and registered under the manufacturer's parts warranty.
- 4.3.8. Provide confidence that the Offeror understands reporting and reimbursement paperwork will be required, and that in the low-income program some additional responsibilities will fall on the Offeror, because the grant will be directly reimbursed to the Offeror instead of the household. [Contractor Support – ACES](#)

- 4.4. **Proposed Approach:**
 - 4.4.1. Please estimate/describe anticipated workflow, and a timeline from receiving the energy assessment from AHS to submitting the reimbursement paperwork, based on your experience.
 - 4.4.2. Please address problems you foresee, or advice based on experience.

- 4.5. **Cost Proposal:**
 - 4.5.1. Example of a 15-kW heat pump quote, with a larger size option (over grant amount) – with detailed breakdown of costs, including labor, equipment, balance of systems, and any additional charges (sub-costs) foreseen. Include two versions, one fully grant covered and the larger version with customer cost share.
 - 4.5.2. Discuss any pricing options or discounts available for bulk installations for low-income households. Ways in which out of pocket costs for homeowners could be lessened or eliminated in most cases.
 - 4.5.3. Discuss any preferred work locations that may require fewer overhead costs for your team, by listing the region or communities you would prefer to cover.
 - 4.5.4. Provide an example of the terms of payment that will be presented to the customer explicitly for costs beyond what the grant will reimburse for.



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- 4.6. **Timeline:** Funding for this ACES project is estimated to be until 2029. The contract timeline will be 2 years with the potential to extend for an additional 2.
- 4.6.1. What is your estimated availability throughout the first two years?
- 4.6.2. What is your estimated availability for any extension?

4.7. **Compliance with Regulatory Requirements:**

- 4.7.1. Applicants must have or acquire a UEI through SAM.gov prior to the award finalization (this is a free application and process). Applicants must not be disbarred from receiving federal funds. Please attest to having reviewed this process at SAM.gov you're your willingness and eligibility to meet this requirement.
- 4.7.2. A statement affirming the contractor's ability to comply with all local, state, and federal regulations related to heating systems, energy efficiency, and low-income housing programs.
- 4.7.3. Davis Bacon Payment of Prevailing Wages:
- Contractors must pay at least the prevailing wages and benefits listed in the wage determination.
 - Certified payroll records must be submitted, with hours, wages, and benefits maintained.
 - Subcontracts must include the applicable Davis-Bacon provisions.

5. **Evaluation Criteria:**

Proposals will be evaluated based on the following criteria:

- 5.1.1. Experience and Qualifications (30%): Demonstrated experience and qualifications in heat pump installation, especially in low-income homes and present in Alaska.
- 5.1.2. Approach and Methodology (25%): Quality and feasibility of the proposed approach, including timelines, site assessment, availability and resident support.
- 5.1.3. Cost Proposal (25%): Reasonableness and transparency of costs, including any bulk or discounted pricing.
- 5.1.4. References and Past Performance (20%): Positive feedback and demonstrated success in similar projects.
- 5.1.5. Compliance and Certifications: Pass/ fail

6. **Terms and Conditions**

- 6.1.1. Southeast Conference reserves the right to reject any or all proposals, negotiate terms, or select a contractor(s) based on the best value for the project.



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- 6.1.2. All contractors must adhere to local, state, and federal laws and regulations regarding construction, licensing, and energy efficiency standards.
- 6.1.3. Contractors must provide ongoing warranty support for the heat pump systems, as specified in the proposal.
- 6.1.4. The selected contractor must carry insurance as specified in the RFP and provide proof of coverage before beginning work. The successful respondent must secure satisfactory insurance coverage detailed in the contract. Failure to provide evidence of adequate coverage is a material breach and grounds for termination of the contract.
- 6.1.5. The selected contractor will be required to enter into a deliverable based, formal contractual agreement with SEC.
- 6.1.6. All collected data will remain the property of Southeast Conference. Data that contains personally identifiable information, including building address, will not be shared. Southeast Conference reserves the right to share/disseminate data that does not contain personally identifiable information delivered by contractor(s) with public partners.
- 6.1.7. The successful proposal will become an integral part of the contract awarded. It will not, however, be considered the total binding obligation for the contract. Any and all proposal conditions may be included, at the discretion of SEC, as a part of the final negotiated and approved contract.
- 6.1.8. This RFP does not oblige SEC to perform until a contract is signed and approved by the parties. If approved, it is effective from the date of approval by SEC. SEC shall not be responsible for work done, even in good faith, prior to approval of the contract, unless specific provisions are made in the contract.

7. Conclusion

In summary, heat pump installations must comply with national energy efficiency standards, electrical codes, local building codes, and manufacturer's installation instructions. Reporting will be required to fulfill SEC's grant obligations to the EPA.

Southeast Conference looks forward to receiving proposals from qualified contractors to assist in providing energy-efficient heat pump systems throughout coastal Alaska. This project will contribute significantly to reducing energy costs and improving the living conditions of families in need. We are committed to selecting a contractor(s) who demonstrate expertise, reliability, and a strong commitment to community service. Thank you for your interest in this project!