



**Request for Proposals (RFP) for  
Innovation Hub State-Level Pilot Support Services  
EM-009-2026**

**Date Issued: June 17, 2026**

**Proposals Due: August 26, 2026, 11:59 p.m. Eastern Time (US)**

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**Separate attachments:**

Attachment A – Project Cost Proposal Form

Attachment B – Services Agreement for CPRG-Funded Projects

Attachment C – Team Commitment Form

Attachment D – Confidential Information Management System Policy

Attachment E – Low- to Moderate- Income Census Tracts

## SECTION 1 – RFP INFORMATION AND INSTRUCTIONS

### 1.1 Purpose

The Efficiency Maine Trust (the Trust) seeks a qualified contractor or team of contractors (the Contractor) to implement a suite of initiatives in Maine to demonstrate new or emerging applications of heat pump technology that will facilitate and accelerate the use of heat pumps as the primary source of space heating and water heating in residential dwellings. In particular, the Trust seeks to use the Pilot to field test, analyze, optimize, demonstrate and report out the performance and economics of technical solutions (e.g., models of heat pump equipment, engineering designs, installation techniques) for whole-home heating in cold climates. The installations, and the lessons learned from them, will be used to train HVAC installers in Maine and other states. This project will serve as the core component of Maine’s “State-Level Heat Pump Pilot” funded through the New England Heat Pump Accelerator. The Contractor will serve as the Pilot “delivery team” and deliver all aspects of the Pilot with oversight and direction provided by the Trust. The Contract will be structured on a “Time and Materials” basis.

### 1.2 Designated Contact Person for this RFP

Dan Mistro  
Strategic Initiatives Manager  
Efficiency Maine Trust  
Email: dan.mistro@efficiencymaine.com

### 1.3 Schedule

	<b>Milestone</b>	<b>Date/Deadline</b>
1	RFP Issued	6/17/2026
2	Proposer’s Webinar	7/1/2026 @11 am
3	Questions Due	7/8/2026
4	Responses to Questions Posted	7/15/2026
5	Proposals Due	8/26/2026
6	Anticipated Award Date	9/9/2026
7	Anticipated Contractor Start	9/23/2026
8	Project Launch	9/30/2026

Schedule changes: The Trust reserves the right to modify this schedule at its discretion. Any changes or additional information regarding the RFP schedule and pre-proposal activities, including responses to questions, will be posted on the RFP EM-009-2026 webpage at <https://www.energymaine.com/opportunities/rfp-em-009-2026/>.

### 1.4 Anticipated Contract Term

The Trust anticipates awarding a contract to cover a period of performance from 09/23/2026 through 10/01/2029.

### **1.5 Anticipated Contract and Budget**

The Trust has a working budget of up to \$14 million to pay for all costs associated with the State-Level Heat Pump Pilot projects through September 2029. This includes equipment costs, equipment installation, data collection and analysis, training and reporting. The Contract will be structured on a “Time and Materials” basis using a “Not-To-Exceed” maximum budget. The Trust does not anticipate awarding the full working budget at the beginning of the contract; some funds may be reserved for future, follow up projects.

If the proposer is a team, then one party must be identified as the prime contractor with overall management responsibilities.

This contract will be paid utilizing federal funding and will contain provisions and riders enumerating applicable federal requirements.

As noted in section 3.3.2, below, after the contract is awarded and in collaboration with the Contractor, the Trust will approve a detailed implementation plan for each of the four initiatives described in section 3.2. Those detailed implementation plans will include working budgets to reflect the specific equipment to be installed, and communities to be targeted, once those are finalized. This approach will accommodate variations in equipment and installation costs over the three-year period, as well as any adjustments that may be warranted regarding the number of units to be installed. Proposals are encouraged to recommend cost-effective methods that meet the requirements laid out below. Proposals that include a base scope and optional tasks priced separately will be considered.

### **1.6 Proposal Submittal Deadline**

All responses must be submitted electronically via the online Submission Form on the RFP EM-009-2026 webpage (<https://www.energymaine.com/opportunities/rfp-em-009-2026/>). Proposals must be received by the due date and time specified in section 1.3. Proposers will receive a time-stamped confirmation email when their proposals are submitted. (Note: There may be a delay of a few minutes between submission and this confirmation email). Any proposal received after the deadline will not be considered. Proposals must be complete when submitted; changes or additions will not be accepted after the specified due date and time, except for any clarifications requested of proposers by the Trust. The Trust encourages proposers to submit their proposals with sufficient time to account for any technological challenges (e.g., Internet disruptions).

### **1.7 Submitting Questions**

The Trust will hold a webinar for parties interested in submitting a proposal in response to this RFP on July 1, 2026 at 11 am. The sole purpose of the webinar will be to review the terms and requirements of this RFP, as written, and to answer questions from these parties. Parties that are considering submitting a proposal are strongly encouraged to attend the webinar. Please sign up for the webinar at this link: [https://energymaine.zoom.us/webinar/register/WN\\_gTwyfCtNQfGZb-WjeTKOfg](https://energymaine.zoom.us/webinar/register/WN_gTwyfCtNQfGZb-WjeTKOfg)

It is the responsibility of all parties submitting proposals to examine the entire RFP and to seek clarification, in writing, if they do not understand any information or instructions. Questions regarding this RFP must be submitted by email to the Designated Contact Person listed in section 1.2 prior to the due

date for questions noted above in section 1.3. The subject line of the email should be: "Title of RFP EM-009-2026." Responses to questions will be posted on <http://www.efficiencymaine.com/opportunities/rfp-em-009-2026>, as will all clarifications and amendments released in regard to the RFP. It is the responsibility of all interested parties to check this website periodically to obtain clarifications and amendments. Only those clarifications and amendments posted on this website are considered binding.

### **1.8 Proposal Confidentiality**

Information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Parties submitting proposals should assume that all information submitted in response to this RFP will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.

### **1.9 Contract Award**

The Trust will notify all parties who submitted proposals of the contract award decision by email. The Trust reserves the right to negotiate the final terms and conditions of the contract award with a party whose proposal is selected by the Trust, and to reject any selected party with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment. The Trust reserves the right to reject any proposal that does not meet these requirements.

### **1.10 Contracting Process**

The selection process is governed by the Efficiency Maine Trust Rule Chapter 1: Contracting Process for Service Providers and Grant Recipients, which can be found on the Trust's website: <http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

### **1.11 RFP Process – Reservation of Rights**

The Trust reserves the right to cancel or extend the RFP process at any time, and to issue clarifications and amendments to the RFP. The Trust also reserves the right to reject noncompliant submissions in response to this RFP. The Trust, in its sole discretion, reserves the right to recognize and waive irregularities found in proposals received in response to this RFP. Issuance of this RFP does not commit the Trust to make an award. The Trust will not pay any costs or expenses incurred by any party in connection with preparation of a proposal or response to this RFP.

### **1.12 Contract Agreements**

A copy of the Efficiency Maine Trust Standard Agreement appropriate to this RFP is provided as **Attachment B – Service Agreement for CPRG-Funded Projects**. This program will be funded with federal funds and will be subject to certain federal terms and conditions (riders) as described in the agreement.

The Contractor will be required to pass any and all applicable flow-down requirements to members of its team and/or any subcontractors. As described in the scope of work, this may include supporting installation contractors with payroll documentation requirements, where applicable.

The selected Contractor and its agents and subcontractors will be required to follow the Trust's Confidential Information Management System Policy and complete Appendix B of the policy, provided as

**Attachment D – Confidential Information Management System Policy.** Certain information regarding a customer that has participated or that may participate in a Trust program is deemed confidential by the Efficiency Maine Trust Act. See <http://legislature.maine.gov/statutes/35-A/title35-Asec10106.html> for additional information on related confidentiality restrictions.

The RFP and the awarded proposal, including all appendices and attachments, shall be the basis for the final contract.

### **1.13 Request for Reconsideration**

An aggrieved person may request a hearing for reconsideration of a contract award decision by filing a written petition with the Executive Director of the Trust within 14 calendar days of the notification of the contract award. Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Trust's website under Documents and Services:

<http://www.efficiencymaine.com/docs/Chapter-1-Contracting-Process-for-Service-Providers-and-Grant-Recipients.pdf>.

## **SECTION 2 –BACKGROUND INFORMATION**

### **2.1 Efficiency Maine Trust**

The Efficiency Maine Trust (the Trust) is the independent, quasi-state agency established by the Maine Legislature to plan and implement programs promoting energy efficiency, demand management, and beneficial electrification in Maine. Through its suite of nationally recognized programs, the Trust provides consumer information, marketing support, demonstration pilots, discounts, rebates, loans, and other initiatives to promote high-efficiency equipment and operations that help Maine’s homes, businesses, and institutions reduce their energy costs and lower their greenhouse gas emissions. The Trust is governed by a Board of Trustees with oversight from the Maine Public Utilities Commission.

### **2.2 Background and Program Overview**

The New England Heat Pump Accelerator (the Accelerator) is a federally funded project to accelerate the adoption of heat pump technology in residential homes across New England. Maine is one of five states participating in the initiative, along with Connecticut, Massachusetts, New Hampshire, and Rhode Island. The Accelerator comprises three program pillars: a market hub, resource hub, and innovation hub. In each state, there will be two categories of innovation hub projects: “state-level pilots,” and “community-level grants.” This RFP seeks proposals exclusively to implement a pilot project for the “state-level” category, which in Maine is being administered by the Trust; this RFP does not seek and will not accept proposals intended for the “community-level” category.

The Trust will administer the State-Level Heat Pump Pilot through, and as a component of, the Trust’s existing Innovation Program.

### **2.3 Stakeholder Engagement**

On October 14, 2025, the Trust, together with Maine’s Department of Energy Resources (DOER) and the Governor’s Office of Policy Innovation and the Future (GOPIF), issued a Request for Information (RFI) from interested stakeholders, soliciting written input on priorities for pilot(s). Subsequently, the Trust staff met with the Board of Trustees Innovation Program Advisory Group on October 22, 2025 to discuss priorities and applicable restrictions and processes for the use of the Accelerator’s Innovation Hub funds. On October 23, 2025, the Trust hosted a webinar with stakeholders to discuss priorities and opportunities, answer questions about the Innovation Hub in Maine, and gather input. Responses to the RFI were submitted and reviewed in mid-November. Information obtained through stakeholder engagement was reviewed and factored into the design of this RFP. State priorities were discussed and agreed upon by the Trust, the Trust’s Board Innovation Program Advisory Group, DOER and GOPIF. The Trust may solicit additional stakeholder input throughout the course of implementing the pilot.

### **2.4 Efficiency Maine Reporting and Tracking (effRT)**

The Trust’s programs are data-driven and their success hinges on the capacity to measure and verify the energy and cost savings derived from program participation. The primary tool that Efficiency Maine has developed for data management is known as the Efficiency Maine Reporting & Tracking System (effRT) database. The database platform manages the data for all of the Trust’s active programs and ensures consistent and accurate estimates of energy savings. The system also enables trade allies (such as Qualified Partners) to expedite the processing of incentives, significantly reducing paperwork.

The winning bidder will be required to use effRT for documenting and processing project applications as well as for reporting on program results. The effRT database is SQL-based with an online interface created and currently maintained with ASP.net tools. Since its initial development to support delivery of the Business Incentive Program, the effRT database has been continuously refined to address the evolving needs and features of additional programs offered by the Trust. The Trust continues to work toward a fully unified data management structure that can capture and report on a diverse array of data originating from a variety of sources, without being burdensome to program administration, delivery, and reporting requirements.

## 2.5 Additional Sources of Information

Following are links to additional information that proposers may find helpful in preparing a response to this RFP:

TITLE	LOCATION (link)
Efficiency Maine Trust website	<a href="http://www.energymaine.com">http://www.energymaine.com</a>
Efficiency Maine Trust Annual Reports	<a href="https://www.energymaine.com/about/library/reports/">https://www.energymaine.com/about/library/reports/</a>
Efficiency Maine Trust – Triennial Plan	<a href="https://www.energymaine.com/about/library/policies/">https://www.energymaine.com/about/library/policies/</a>
New England Heat Pump Accelerator in Maine	<a href="https://www.energymaine.com/new-england-heat-pump-accelerator/">https://www.energymaine.com/new-england-heat-pump-accelerator/</a>
Request for Information	<a href="https://www.energymaine.com/request-for-information-rfi-on-maines-heat-pump-accelerator-innovation-priorities/">https://www.energymaine.com/request-for-information-rfi-on-maines-heat-pump-accelerator-innovation-priorities/</a>

## SECTION 3 –SCOPE OF WORK

Following is a description of the work to be covered by this RFP. As explained in section 4.3, below, proposals must reflect the proposer’s plan, approach, and capacity for each task and describe related experience.

The winning proposer must commit to completing all tasks within the Contract Term and as approved by the Trust. The Contractor must provide the Trust with electronic copies of all deliverables in Microsoft Office software format or other appropriate format approved by the Trust.

### 3.1 Overview

#### 3.1.1 Background Context

The Trust has been operating heat pump programs in Maine for more than a decade. During that time, the programs have evolved from simply raising awareness, providing introductory training, and offering financial incentives on mini-split heat pumps serving as supplemental space heaters. The Trust’s evaluations of the performance of those supplemental heating systems showed that they were able to efficiently generate heat even under very cold conditions. However, these evaluations also showed that, on average and in a significant number of homes, the supplemental heat pumps were not being used to their full potential.<sup>1</sup>

This finding presented a problem that required changes to the program. The Trust recognized that, even with attractive financial incentives and financing through the Trust’s programs, there is a significant capital cost of installing one or more mini-split heat pumps. Because the operating costs are lower when producing heat from a well-designed, high-efficiency heat pump system than with a furnace or boiler fueled with heating oil, propane or kerosene, it is clear that the more the heat pumps can displace those fuels, the more the consumer will save on their overall energy bills.<sup>2</sup> The more the consumer saves on their energy bills, the better the payback on their investment in heat pumps will be. Better payback makes it easier to market heat pumps to others, accelerating heat pump adoption. The faster adoption accelerates and the market transforms, the greater the reduction to annual heating bills and the greater the suppression of electricity rates for all Maine ratepayers.

On this basis, the Trust modified its program rules on eligibility for heat pump rebates beginning in September 2023. From that date, the Trust started limiting rebate eligibility to “whole-home heat pump systems” where the heat pumps serve as the home’s primary heating system. Eligibility extends to heat pump systems that are centrally ducted, systems that use one or more distributed (e.g., mini-split) heat pump units sized and configured to fully heat the home for the entire heating season (i.e., without using the old central furnace or boiler except in emergencies), and systems that use a combination of both.

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<sup>1</sup> [https://www.energymaine.com/docs/Efficiency\\_Maine\\_Residential\\_Heat\\_Pump\\_Impact\\_Evaluation\\_Report-2024.pdf](https://www.energymaine.com/docs/Efficiency_Maine_Residential_Heat_Pump_Impact_Evaluation_Report-2024.pdf)

<sup>2</sup> Maine is the most heating oil reliant state in the nation, with over 50% of households using heating oil as a primary heating fuel (see <https://www.maine.gov/energy/studies-reports-working-groups/current-studies-working-groups/energyplan2040>). Also see <https://www.energymaine.com/at-home/heating-cost-comparison/> for estimated annual costs of heating using different heating systems.

This new program design has been in effect for more than two years, during which time tens of thousands of Maine homes have made the switch to whole-home heat pump systems. Nearly all of them have employed mini-split heat pumps. While the heat pumps are demonstrating that they can produce heat efficiently throughout Maine's long, cold winters, consumers, and the vendors/installers who serve them, are also experiencing a variety of challenges that are unique to using heat pumps as the primary heating system in a cold climate.

As a general matter, the challenge to making heat pumps attractive to Maine consumers (and contractors) is ensuring that the whole home can be made comfortable, affordably and reliably, when switching entirely to heat pumps. More specifically, when switching entirely to heat pumps, Mainers may encounter one or more of the following challenges associated with the available technology:

1. In medium-sized and larger homes with a baseline **boiler and hydronic distribution system**:
  - a. the size and quantity of mini-split, air-to-air heat pumps needed to fully heat the home may be uneconomic;
  - b. air-to-water heat pump systems, which can be tied into the existing distribution system, are likely uneconomic to operate at high output temperatures without thermal storage and controls;
  - c. the air-to-water heat pump systems, when combined with thermal storage and controls, may be uneconomic if the costs of system design and installation cannot be reduced;
  - d. heat pump systems that are combined with thermal storage and controls cannot be fully compensated for the value they deliver to the grid under traditional HVAC business models, traditional financing paths, and existing utility metering and billing systems and rate designs.
2. In homes with a baseline **furnace and ducted distribution** system, customers and contractors are reluctant to purchase/install air-to-air heat pumps using the existing distribution system in place of the furnace due to concerns that:
  - a. in Maine's cold winter climate, the heat pumps may be unable to produce sufficient heat for the home
  - b. many of Maine's most active HVAC marketers and installers have limited experience dealing with ductwork, which results in higher price quotes for retrofits in ducted homes; and
  - c. in Maine's humid summers when the system is used for AC, uninsulated ductwork may create condensation leading to mold and other moisture problems inside the home.
3. In **multifamily** buildings,
  - a. where the landlord provides domestic water heating through a central system, the Maine marketplace is unfamiliar with, and does not currently offer, a heat pump-based water heating solution;
  - b. where the apartment spaces are relatively small and may be separated by closed doors, the Maine marketplace lacks lower-cost heat pump solutions that can distribute the heat into each room.
4. **Heat pump water heaters** face technical barriers in certain types of building structures and in certain baseline plumbing and electrical situations.
  - a. For homes lacking a suitable unconditioned space for a unitary heat pump water heater (such as mobile homes, homes on a slab, older homes with a dug cellar, apartments), the Maine marketplace is unfamiliar with, and does not currently offer, split-system heat pump water heaters as an alternative.

- b. For homes seeking to shift away from tankless coil systems that pull hot water off the central boiler, installation costs of adding a 240v circuit and new plumbing can make a new unitary heat pump water heater unaffordable.

### **3.1.2 Pilot Priorities**

The Trust will collaborate with the Contractor to implement a comprehensive, multifaceted State-Level Heat Pump Pilot (the Pilot) to test and demonstrate the performance of a variety of technical innovations that will help make whole-home heat pump conversions more viable and attractive. The Pilot will field test and demonstrate the performance and economics of a suite of potential solutions that are as yet unproven or unestablished in the Maine marketplace, in Maine's cold climate, and that present significant potential in terms of performance, economic improvement, and scalability. The solutions will be pursued through the four initiatives outlined in Section 3.2. The Trust expects the Contractor to implement these solutions under the Trust's direction and oversight.

A top priority of the Pilot will focus on field testing and demonstrating solutions related to retrofitting heat pumps on standard boiler hydronic heating systems, which are the most prevalent heating systems in Maine (Initiative 1). A key task for the Contractor will be to oversee installations of hydronic heat pump systems with controls and thermal storage tanks in a sample of qualifying homes with configurations established by the Trust and its existing partners. This initiative will build on a demonstration pilot of five homes with hydronic heat pumps, controls, and thermal storage that has been conducted by the Trust and existing partners in Millinocket. The Trust and its existing partners will refine a variety of configurations and settings seeking to maximize value to the homeowner and ratepayers by taking advantage of lower-cost, off-peak electricity. The winning proposer of the RFP will be tasked with overseeing the provided configurations carried out in targeted communities in Maine.

The Contractor will work with the Trust to identify the communities and/or eligible homes in which the Pilot's initiatives will be implemented. Primary consideration will be given to low- and moderate-income census tract communities (see Attachment E), as well as the rates of the local electric utility. Both Central Maine Power and Versant Power, the two largest utilities in Maine, offer time-of-use electricity distribution prices, with steep discounts on off-peak prices. The off-peak price advantage could be even greater if an energy provider were to offer a differentiated price on electricity supply. There are also several cooperative and municipal-run utilities in Maine that could directly benefit from their customers participating in this initiative. In the future, if the utilities have more sophisticated grid management systems, the thermal storage connected to the heat pump systems could help balance intermittent renewable generation. The advantage of heat pumps with thermal storage would be low-cost, whole-home heating, taking advantage of low-cost, clean electricity without stressing the grid.

As further described in the Objectives and Tasks below, additional initiatives of the State Pilot will focus on equipment, designs and/or practices that will help overcome the technical challenges outlined above. Initiative two will focus on ducted heat pumps, which are currently much less common in Maine than ductless mini-splits—even in homes with existing furnaces and ductwork—due to factors such as cost barriers and limited technical expertise. In addition, the team will pilot replacing existing furnaces with heat pumps by reusing a home's existing heating/cooling distribution system (i.e., ductwork, registers, etc.) to reduce costs and barriers of ducted heat pump installations. Initiative 3 will focus on implementing heat pumps for both space conditioning and water heating in multifamily buildings using new forms of heat pump technology better served for these building types. The fourth initiative will test new forms of heat pump water heaters to determine if they can perform, economically, in building types that are not

conducive for unitary, 240v heat pump water heaters. This initiative will test if split-system heat pump water heaters can serve as an appropriate technology in homes that lack unconditioned space and bring down the cost and barriers of adopting heat pump water heater technology.

### 3.2 Pilot Objectives

This Pilot will provide the Trust with an opportunity to field test and report on a suite of technical solutions directly addressing barriers to whole-home heating with heat pumps. Identified initiatives include but are not limited to:

#### Initiative 1 – Retrofitting boilers and hydronic distribution systems

In homes with a baseline **boiler and hydronic distribution system**, retrofitting air-to-water heat pump systems into the existing distribution system (e.g., forced hot water, fin-and-tube baseboard radiators) to test and demonstrate:

- a. If these systems can be designed and operated to provide output temperatures below the traditional 180° F (e.g., at 120 - 140° F) to improve the efficiency and economics of the heat pump system while maintaining comfort throughout the home;
- b. Whether the costs of adding thermal storage and controls system can be significantly reduced by standardizing the design and installation, and by training installers to employ the standardized approach;
- c. What control strategies, distribution temperatures, and system configurations are optimal for customer savings, ratepayer benefits, and GHG savings;
- d. How customers could reduce their net heating costs by accessing savings through time-of-use (TOU) rates;
- e. The costs, savings and performance impacts of any other type or modification of equipment, design, or installation that could meaningfully reduce costs of the equipment, installation or ownership of retrofitting heat pumps in homes with hydronic distribution systems;
- f. How the vendors or aggregators could employ non-traditional business models and financing, together with modernized utility metering and billing systems and improved rate designs, to reduce or eliminate the upfront costs of the retrofit to the customer.

For the purposes of proposing a general approach and budget for implementing Initiative 1, assume hypothetically that the goal is to install a total of 100 systems in 5 distinct communities around the state. An assumed cost per system is provided by the Trust in the Project Cost Proposal Form.

#### Initiative 2 – Retrofitting furnaces and ducted distribution systems

In homes with a baseline **furnace and ducted distribution system**, retrofitting a ducted air-to-air heat pump to test and demonstrate:

- a. Whether specific models of heat pumps, with or without additional efficiency improvements (e.g., insulating ductwork) are able to produce sufficient heat, cost-effectively, in Maine's cold winter climate;
- b. Whether existing ductwork is appropriately sized for a heat pump retrofits; and

- c. Whether specific models of heat pumps, combined with duct insulation or other measures, will avoid condensation and other moisture problems in Maine's humid summers when the system is used for air conditioning;
- d. The costs, savings and performance impacts of any other type or modification of equipment, design, or installation that could meaningfully reduce upfront costs of retrofitting heat pumps into existing ducted systems.

For the purposes of proposing a general approach and budget for implementing Initiative 2, assume hypothetically that the goal is to install a total of 25 systems. An assumed cost per system is provided by the Trust in the Project Cost Proposal Form.

### Initiative 3 – Multifamily buildings

In multifamily buildings, test and demonstrate:

- a. Commercially available heat pump-based central water heaters to determine if they are cost-effective and perform to the customers' satisfaction;
- b. Specific models of air-to-air heat pumps systems to determine if they can cost-effectively serve small apartments and apartments in which there are adjacent rooms / spaces separated by closed doors;
- c. The costs, savings and performance impacts of any other type or modification of equipment, design or installation that could meaningfully reduce costs of using heat pumps in multifamily buildings.

For the purposes of proposing a general approach and budget for implementing Initiative 3, assume hypothetically that the goal is to install a total of 10 central water heaters and 300 air-to-air heat pump units (a dwelling may have multiple units installed) in three or four distinct communities around the state. An assumed cost per system is provided by the Trust in the Project Cost Proposal Form.

### Initiative 4 – Heat pump water heaters

- a. For homes lacking a suitable unconditioned space for a unitary **heat pump water heater**, test and demonstrate specific models of split-system heat pump water heaters to determine if they will be cost-effective and perform to the customer's satisfaction in Maine's cold climate, so that Maine distributors, plumbers and HVAC installers will stock, market, and install them.
- b. For homes seeking to shift away from fossil-fuel domestic hot water systems where there is suitable space for unitary heat pump water heaters, test and demonstrate options to overcome upfront costs associated with installing a 240v heat pump water heater, including measures (such as smart panels, 120v heat pump water heaters, etc.) to minimize the costs of electrical upgrades and new plumbing.

For the purposes of proposing a general approach and budget for implementing Initiative 4, assume hypothetically that the goal is to install a total of 100 systems in 5 distinct communities around the state. An assumed cost per system is provided by the Trust in the Project Cost Proposal Form.

### **3.3 Awardee Implementation Task by Task Description for Each Initiative**

Following is a task-by-task description of the work associated with each independent initiative identified by this RFP. The Contractor, in consultation with and under the direction of the Trust, will be expected to complete all tasks identified for every initiative identified as part of this comprehensive, multifaceted State-Level Heat Pump Pilot. These tasks include but may not be limited to:

#### **3.3.1 Task 1: Pilot Kickoff Meeting**

The Contractor will organize and facilitate a Project Kickoff Meeting to be held at the Trust's offices (with virtual participation as appropriate). The purpose of the meeting is for the Trust and the Contractor to establish a common understanding of the deliverables, the overall project schedule, and expectations regarding the conduct of the Pilot, and to provide the foundation for development of the Implementation plan. At a minimum, this meeting should include discussion of the proposed statement of work and schedule and communication protocols and expectations.

#### **3.3.2 Task 2: Implementation Plan for Pilot Initiatives**

After the Contractor has begun operating under a signed agreement, Contractor will develop a detailed Implementation Plan for each Initiative in Section 3.2. Each Plan will specify the details of the approach, schedule, measurement and verification, and quality assurance plan, for each sub-task and deliverable required as part of each Initiative. The Plan will specify how each of the tasks outlined below will be implemented. The Contractor will not proceed to implementation until, and to the extent, the Plan has been approved by the Trust staff.

#### **3.3.3 Task 3: Equipment Identification and Procurement**

The Contractor will develop specifications for equipment to be installed and demonstrated to address the objectives identified by the Trust for each Initiative. As part of this process, the Contractor will work with equipment manufacturers and vendors to understand the most appropriate models available and the optimal approach to procure them for use in the Initiative.

#### **3.3.4 Task 4: Initiative Sample Size and Host Site Criteria**

The Contractor will develop a methodology for determining the appropriate number of test homes (or buildings) needed to test the technology identified for the pilot Initiative in order to adequately address the objectives identified in 3.2. In addition, the Contractor will identify necessary criteria and considerations for the location of test sites, such as availability and accessibility of vendors and installers, baseline heating systems, and outdoor temperature range. Funding from the Innovation Hub will be limited to pilot projects that are installed in residential properties that house low- to moderate- income households or are located in low- and moderate-income census tracts (see Attachment E). Some aspects of the pilot may require partnering with a specific utility or community-based organization. The Trust seeks to test the solutions in a variety of locations of the state to measure and verify their performance and economics in varying sub-climates and other circumstances. However, the Trust also seeks to manage costs of the pilot and maximize the quality of project installations, oversight, and training opportunities. The Trust understands that achieving a balance of these two goals will, in some circumstances, favor concentrating projects in fewer and/or more proximate locations.

### **3.3.5 Task 5: Participant Recruitment and Enrollment**

The Contractor, in collaboration with the Trust, will develop and execute a plan to recruit and enroll property owners to participate in the Initiative.

Sub-Tasks will include:

- marketing and outreach to recruit potential host site communities and homes;
- partnering, where appropriate, with installers, government agencies, and/or community-based organizations (e.g., local CAP agencies) to assist in identifying and contacting potential participants;
- verifying eligibility and suitability of potential participants, building type(s), and baseline heating system(s),
- working with the Trust to develop necessary instructions, forms, and disclosures to share with participants;
- employing the instructions, forms and disclosures to inform the participants about the Initiative goals, the expected performance of the heat pump system(s), terms and conditions of participating in the Initiative (including explicit explanation and acknowledgement of who owns the heat pump system and holds responsibility for maintenance and operation at the end of the Initiative, and provisions, where applicable, for decommissioning);
- If approved by the Trust, developing template agreements for vendors and/or customers to use in effectuating non-traditional business models and financing; and,
- enrolling participants in the Initiative through execution of a written agreement.

### **3.3.6 Task 6: Equipment Installation**

The Contractor will be responsible for installation of the equipment identified in Task 3 at selected site homes and communities. Tasks will include:

- Recruiting and procuring services of qualified equipment vendors and sub-contractors to install and/or service equipment for the Initiative;
- Ensuring that host sites/participants have completed the relevant forms and agreements;
- Coordinating installation schedule and process with host sites and communicating with participants;
- Ensuring sub-contractors are provided with education or training, as necessary, to properly install the equipment or systems being tested;
- Working with equipment manufacturers to ensure installation best practices;
- Providing, or procuring and managing, technical and engineering support;
- Developing recommendations for optimizing system configurations, installation practices, control strategies that may be implemented at the Trust's direction;
- Managing the work of vendors and installers to install, configure and/or control heating systems being tested and demonstrated;
- Ensuring compliance with any and all applicable federal flow down requirements (The Trust anticipates that Davis-Bacon and Related Acts, National Historical Preservation Act, and Build America Buy America Act (BABA) will be the most relevant requirements for installations associated with this pilot);
- Ensuring compliance with the Trust's procurement policies for procurement of equipment and sub-contracted services (e.g., installation) used in the Initiative; and

- Inspecting installations to ensure applicable codes, standards and best practices are being met and the installation meets the full Scope of Work.

At this time, the Trust is continuing to receive updates on guidance about the application of federal flow down requirements from its Heat Pump Accelerator partners and the EPA.

- At this time, we anticipate that Davis Bacon wage requirements will apply to all installation and maintenance work undertaken in these initiatives. In the Trust's experience, wage documentation can be a challenge for small businesses and installers, and we anticipate that the Contractor may need to provide documentation support for installation sub-contractors. To the extent the Contractor intends to use sub-contractors for installation and repair services and those sub-contractors are not specifically identified in the proposal, the Trust anticipates that the Contractor will need to ensure compliance with competitive procurement requirements and to comply with Davis-Bacon wage requirements.
- A historic preservation review may be required for projects where there is an element of the heat pump on the exterior of a home 50-years old or greater. The Trust has an existing agreement in place with the Maine State Historic Preservation office for these kinds of reviews and will support the Contractor with the review process.
- BABA requirements will **not** apply to privately owned single-family home projects but may be triggered for larger, multi-family home projects that are publicly owned or have public spaces.

### **3.3.7 Task 7: Equipment Maintenance**

The Contractor will ensure that the equipment is operating properly and performing as anticipated to meet pilot objectives. Tasks will include promptly addressing any equipment failures and solutions, managing applicable warranties, managing the work of vendors and installers, coordinating and communicating any maintenance schedule and process with host sites and participants. As part of this task, Contractor is also responsible, together with the Trust, for determining if and when it is necessary to decommission and/or replace equipment prior to the completion of the field test, when the equipment is not performing to the satisfaction of the participant or the Pilot team.

### **3.3.8 Task 8: Evaluation, Measurement and Verification**

The Contractor will manage all aspects of the evaluation, measurement and verification associated with each Initiative. Sub-Tasks will include:

- Conducting measurement and verification of performance through metering, surveys, and other data collection requirements;
- Analyzing and reporting on all data and other project outcomes; and
- Collecting any and all applicable project documentation required for federal and program reporting requirements; and
- Coordinating schedule and process of evaluation with host sites and communicating with participants as needed

### **3.3.9 Task 9: Decommission systems (fulfillment of Pilot Participant Agreement)**

The Trust expects that the property owners/customers who participate in the Pilot will be given full ownership rights and responsibilities to keep the heat pump system(s) that are installed through the Pilot. The terms and conditions for this arrangement will be spelled out in a Pilot Participant Agreement that must be executed by participating property owners/customers. The Trust recognizes that for some portion of the Pilot participants, the installed equipment may not be performing at a level that is satisfactory by

the conclusion of the field test or demonstration period (but in no case later than 2029). In those cases, it may be necessary to decommission the piloted heat pump system.

The rights, responsibilities, criteria and procedures for decommissioning will be articulated in the customer participant agreement.

At the completion of the trial period, the Contractor will be responsible for determining if any equipment needs to be decommissioned and take all necessary steps where decommissioning is deemed appropriate. Sub-Tasks will include:

- Coordinating schedule and process with host sites and communicating with participants;
- Managing the work of vendors and installers to complete any and all decommissioning and removal of technology as necessary.

### ***3.3.10 Task 10: Budget Management and Program Data Tracking***

The Contractor must maintain timely, complete, and accurate records of all projects in effRT. The Contractor must provide easily accessible information that allows the Trust to track pilot performance and complete the required monthly reporting as stipulated in the grant agreement. The Contractor will help the Trust generate reports reflecting this information as needed.

### ***3.3.11 Task 11: Reporting and Documentation***

The Contractor will be required to comply with federal flow-down requirements and to pass these requirements on to all subcontractors. Team members will need to provide the required documentation for the projects, including Davis Bacon wage compliance where applicable. The Contractor will be required to provide the required documentation for all invoices. The Trust anticipates that this might include supporting installation contractors with required documentation. In addition, the Trust is required to submit monthly progress reports on the use of the federal funds, to contribute data to semi-annual and annual reports to the EPA, and to submit a final report on the State-Level Heat Pump Pilot. The Contractor, in consultation with the Trust, is expected to assist with preparing these and any other relevant reporting deliverables.

### ***3.3.12 Task 12: Dissemination of Findings***

The Contractor will assist the Trust in the production of outreach materials to describe the pilot activities and to share findings, lessons learned, and best practices.

The Trust seeks to generate high-quality, written and video materials to describe the activities and learnings of the Pilot so that these descriptions may be disseminated to regional and national audiences, such as trade associations, manufacturers associations, vendors and contractors (installers), training centers, program administrators, policymakers, media and opinion leaders. The Implementation Plan for each Initiative in this Pilot must contain a brief description of the expected deliverables for this Task. The description should address what data, images, audio and video inputs are likely to be needed to compile these deliverables, and the timing and location of where and how those inputs will be collected. The Contractor will collaborate with the Trust in developing the findings, lessons learned and best practices to be reported, and unless otherwise directed by the Trust, will be responsible for production of the resulting outreach materials. The materials produced under this section will be branded as materials of the Efficiency Maine Trust, with rights of co-authorship for the Contractor.

### **3.4 Call Center Coordination**

The selected Contractor may be required to work cooperatively with the Trust's call center contractor. The Trust's call center contractor is set up to direct all calls into the Trust to the appropriate resources. While the Trust has this support, the winning proposer of the RFP should be expected to have their own customer and vendor support resources that the Trust's call center can direct calls to.

## SECTION 4 – PROPOSAL REQUIREMENTS

### 4.1 Proposal Submission

Proposals must be submitted electronically via the online Submission Form on the RFP EM-009-2026 webpage (<https://www.efficiencymaine.com/opportunities/rfp-em-009-2026/>). All proposals must adhere to the instructions and format requirements outlined in this RFP, in the online Submission Form instructions, and in the written supplements and amendments issued by the Trust.

The online Submission Form will request the following documents:

- RFP response (see 4.3), including Additional Materials (References, Resumes, Samples)
  - PDF format file named “Proposal\_Team\_Name\_RFP\_EM\_009\_2026”
- Attachment A - Project Cost Proposal Form
  - Excel format file named “Project\_Cost\_Team\_Name\_RFP\_EM\_009\_2026”
- Suggested redlines to contract documents, including, Attachment B - Standard Agreement [if applicable]
  - Word format file named “Standard\_Agreement\_Team\_Name\_RFP\_EM\_009\_2026”
  - Attachment B-1 includes federal flow down requirements, most of which may not be applicable to all aspects of program activity. While the Trust invites firms submitting proposals to suggest redlines to the proposed contracts, exceptions to the federal flow-down requirements are not possible.
- Attachment C – Team Commitment Form [if proposal involves any subcontractors]
  - PDF format file named “Team\_Commitment\_Team\_Name\_RFP\_EM\_009\_2026”
- Any additional relevant documents (Word, PDF, or Excel format, as appropriate) [if applicable]

### 4.2 Format Requirements

Proposals will be evaluated for adherence to the following format requirements:

- Proposals must be typewritten.
- Pages must be numbered.
- Unnecessary attachments (e.g., any attachments beyond those sufficient to present a complete, comprehensive, and effective proposal) will not be considered in the evaluation of the proposal.
- Proposals must adhere to prescribed page limits specified in this RFP. The Trust values concise proposals.

### 4.3 Content and Organization Requirements

The proposal must include the following contents, which should be presented in the following order:

1. **Table of Contents**
2. **Introduction** (1 page maximum)

Summarize understanding of the services requested in the RFP and proposed approach to fulfilling the requirements of this RFP. Briefly summarize the proposed project team and qualifications.

### 3. Statement of Work (25 pages maximum)

Provide a brief, general description of your approach, activities and key deliverables in executing each of the tasks outlined in 3.3.

For certain tasks (e.g., Task 1), it may not necessary to provide a separate description for each of the four initiatives of Section 3.2 so long as the proposed approach, activities and deliverables for that task are expected to be largely the same across each initiative.

For each task, describe which members of the Contract team (i.e., firms or individuals, as appropriate) will be responsible for which activities and deliverables so that the reviewers can see the nexus to the qualifications and capacity listed in the next section.

### 4. Qualifications, Staffing, Management and Capacity (10 pages maximum)

#### a. Corporate Qualifications and Capacity

If the proposal is submitted by a team of firms and/or sole proprietors, first, indicate the firm or sole proprietor that will serve as the prime contractor. Describe the team's qualifications, including brief descriptions of no more than three past experience on contracts of similar scope and size. When describing the most relevant past experiences of each firm or sole proprietor in the team, provide the client name, the primary results achieved, and how the work is relevant to the current RFP.

#### *Small Businesses, Veteran-Owned Businesses,<sup>3</sup> and Labor Surplus Area Firms<sup>4</sup>*

If the prime proposer and/or team meet the federal criteria for one or more of these business types, please include the relevant information as part of this section.

Also, indicate any prior commitments, obligations, restrictions or limitations that may impact the capacity of the team to deliver the proposed work in a timely manner.

#### b. Individual Qualifications

For the key staff members that are proposed to work on the project, please provide a very brief description of the individual's role on this project and a summary of his or her relevant education, training, experience and expertise. Include resumes as part of the other Additional Materials (see section 4.3(6)).

#### c. Organizational Chart

Provide an organizational chart of the proposed team for the program. The chart should identify key team members where identified, their roles, and relationships between staff and organizations (the Trust, the Contractor, and any subcontractors). Clearly indicate the day-to-day primary point of contact for the Trust as well as the lead executive contact.

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<sup>3</sup> Please find more information and relevant definitions at the U.S. Small Business Administration website -- <https://www.sba.gov/>.

<sup>4</sup> Please find more information on labor surplus areas here: <https://www.dol.gov/agencies/eta/lsa>

**d. Disclosures**

Disclose and provide details regarding any bankruptcy petition (whether voluntary or involuntary), receivership, insolvency event, or similar adverse financial circumstance suffered or incurred by proposer (or any predecessor entity) within the three years preceding the date of submission of this proposal. Disclose and provide details regarding any litigation, arbitration, or administrative proceedings involving proposer within the three years preceding the date of submission of this proposal in which the amount claimed or adjudged against proposer exceeded \$50,000. Disclose and provide details regarding any debarring or delisting from performance on federal government contracts or by the State of Maine within the three years preceding the date of submission of this proposal.

**5. Cost Proposal** (use Attachment A - Project Cost Proposal Form provided)**a. Narrative**

Provide a brief narrative explanation of the project cost proposal, including the total not-to-exceed price, and an explanation of all relevant cost assumptions.

**b. Cost Form**

Complete the Project Cost Proposal Form (Attachment A) detailing the breakout of costs, including an estimate of labor hours, hourly rates for all personnel, including any subcontractors; other direct costs; and total costs in sufficient detail to allow assessment of the reasonableness and cost-efficiency for the time and materials proposed. Provide rates as applicable by program year (July 1 – June 30) for FY2027, FY2028, FY2029, and the first half of FY2030.

The Contractor will be bound by the labor rates of the staff and subcontractors contracted on the project, however we anticipate that additional installers and professionals will be needed to complete individual installations that may not be captured in the proposals. Additionally we are looking for an example cost estimate to complete all of the tasks specified in this RFP. We are looking for proposers to provide a realistic estimate of staff resources and time that would need to be allocated to complete the provided sample number of sites for each of the four initiatives. The Trust has provided an equipment and installation cost estimate for each of the 4 initiatives as we are not anticipating proposers to know the equipment and contractor costs prior to submitting their bid. Proposers have full flexibility to utilize and edit the provided Cost Form however best communicates their resources and how they anticipate staffing and completing the work. This tab is not considered to be a firm not-to-exceed proposal, rather a demonstration of understanding and ability from the Contractor.

**6. Additional Materials****a. References**

Provide a list of references for the lead proposer and any subcontractors included in the proposal. At least three references must be provided for each organization included in the proposal. For each reference, please provide current contact information (name, company, telephone number, and email address) and a brief description of the work conducted for the reference and its relevance to the current RFP. If evaluations of the Contractor's programs are available, please

provide a list of them that includes the report title, author/independent evaluator, publication date, and URL (or filename if provided electronically) for accessing the report.

OR

**a. Reference Review Form**

Please provide the attached Reference Review Form to three references. References are asked to send the review form to the RFP contact, see Section 1.2. Submission guidelines for references are included on the form.

**b. Resumes**

Provide resumes of key project team members. Key project team members identified in the proposal must be dedicated to the proposed project in the role proposed. Any substitutions of key project team members must be approved by the Trust.

## **SECTION 5 –PROPOSAL EVALUATION CRITERIA**

Proposals that meet the requirements established in the RFP will be evaluated by a proposal review team. The Trust reserves the right to decide whether a proposal is acceptable in terms of meeting the requirements of this RFP and to accept or reject any or all proposals received.

In evaluating proposals, the Trust reserves the right to take any of the following steps, with respect to either all of the proposals received or to a subset of proposals selected as superior to the others: (1) consult with prior clients on the performance of the proposer or of particular persons proposed for this proposal; (2) schedule presentations or interviews with representatives of the proposer or persons proposed for the project; (3) conduct a review of past performance, including a review of reports, analyses, or other materials that would reflect the proposer's performance; (4) evaluate internal information of previous contract history with the proposer (if any), (5) consider other reliable references and publicly available information, and, (6) request additional data or supporting material.

**5.1 Evaluation Criteria**

In evaluating proposals submitted in response to this RFP, the proposal review team will use the following criteria:

Scoring Category	Maximum Points
<p><b>1. Staff and Organization Qualifications and Capacity</b></p> <ul style="list-style-type: none"> <li>a. Is the proposed project staffing plan clear, well-defined, appropriate and realistic for the scope of the services requested?</li> <li>b. How qualified are the proposed personnel in terms of skills, expertise and experience relevant to this program?</li> <li>c. How qualified are the proposed organizations (lead proposer and subcontractors) in terms of demonstrated experience and capacity to execute this type of program?</li> <li>d. What is the feedback from other clients on the performance of the proposer?</li> </ul>	40
<p><b>2. Statement of Work</b></p> <ul style="list-style-type: none"> <li>a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?</li> <li>b. Is the Statement of Work thorough, specific and responsive to the requirements and details specified in the RFP? Does the proposal reflect and respond to the Trust’s priorities?</li> <li>c. Does the proposal suggest a timeline for implementation that starts quickly and is sensible and realistic?</li> <li>d. Does the proposal demonstrate a clear understanding of the Statement of Work and the Trust’s expectations?</li> <li>e. Does the Statement of Work reflect best practices in delivering the specific programs described in this RFP?</li> </ul>	25
<p><b>3. Cost/Budget</b></p> <ul style="list-style-type: none"> <li>a. Are appropriate resources being devoted?</li> <li>b. How does the total proposal cost compare to other comparable proposals?</li> <li>c. Is the proposed budget consistent with the requested Statement of Work?</li> <li>d. How do the quoted rates compare to other comparable proposals?</li> </ul>	25
<p><b>4. Overall Quality and Responsiveness</b></p> <ul style="list-style-type: none"> <li>a. What is the overall quality of the proposal submission, including: completeness, clarity, attention to detail, adherence to instructions and lack of errors?</li> <li>b. Does the proposal seek changes or exceptions?</li> </ul>	5
<p><b>5. Small Businesses, Veteran-Owned Businesses, and Labor Surplus Area Firms</b></p> <ul style="list-style-type: none"> <li>a. Does the prime proposer or subcontractors listed on the team meet the criteria for one or more of these designations?</li> </ul>	5
<p><b>Total</b></p>	<p><b>100</b></p>