

Sustainable Westchester
INSTALLER PARTNER REQUEST FOR PROPOSAL (“RFP”)
EnergySmart Homes 2025 - 2026

Key Information for Submitting the Request for Information	
Issue Date	Tuesday, May 13, 2025
Issued By	Sustainable Westchester
Qualified Applicants	Heat pump and building envelope experts working in Westchester County.
Due Date	Friday, June 13, 2025 at 5:00 pm
Proposal Instructions	Email proposals to Megan Ort at Megan@SustainableWestchester.org
RFP Question Instructions	<p>Questions should be directed to Megan Ort at Megan@SustainableWestchester.org or 914-242-4725, ext. 110</p> <p>We welcome the opportunity to answer questions and assist with your submission.</p>

ABOUT THIS RFP

This RFP acts as an application for installers to enter the installer selection process for the Sustainable Westchester 2025-2026 EnergySmart Homes Program. The RFP provides background information about EnergySmart Homes and expectations that apply to all selected installer partners. The required template for proposals with submission instructions can be found in Attachments A, B, C and D.

1. OVERVIEW OF PROGRAM AND GOALS

Sustainable Westchester is releasing this REQUEST FOR PROPOSAL (“RFP”) for installers of home energy efficiency/weatherization and clean heating and cooling technologies to provide installation services to homes in Westchester as part of EnergySmart Homes. Sustainable Westchester invites new contractors to apply and join the campaign efforts. Due to a demand for heat pumps and energy efficiency upgrades, Westchester needs more contractors to serve this area.

EnergySmart Homes is a community-based outreach and education program led by Sustainable Westchester, that encourages the adoption of home energy efficiency and weatherization measures, air-source heat pump (“ASHP”), ASHP stand-alone water heater (“HPWH”), and ground-source heat pump (“GSHP”) systems. EnergySmart Homes provides personal outreach to individual homeowners, community groups and broad advertising efforts to generate more jobs for participating businesses (installer partners). Installer partners receive leads through the program and are also personally presented to the community at public meetings.

Sustainable Westchester launched the EnergySmart Homes Program in 2019. Since then, hundreds of thousands of residents have seen Sustainable Westchester marketing, participated in events and thousands of homeowners have completed home energy upgrades.

Sustainable Westchester seeks to accelerate the adoption of efficient and cost-effective clean heating and cooling technologies in Westchester homes to reduce and displace fossil fuel use. The program serves residential buildings for single- or small multi-family buildings, emphasizing retrofitting and improving the existing housing stock and heating systems. The territory covered by the EnergySmart Homes program includes all of Westchester County.

Sustainable Westchester is seeking multiple installers to work closely with the EnergySmart Homes team as trusted campaign partners and serve the public by installing home weatherization and relevant clean heating and cooling technologies while helping to expand awareness of these technologies across the County. Contribute your expertise to this effort, grow your business, and help us improve the energy efficiency of buildings in these communities!

The goals of the EnergySmart Homes Program, are as follows:

- **Increase public awareness of** energy-efficient clean heating and cooling technologies

- **Build long-term interest and demand for these technologies in the local market.**
- **Decrease the emissions of greenhouse gasses** through better efficiency, adoption of renewable energy, and beneficial electrification and decarbonization.

Sustainable Westchester will select multiple Installers and will accept joint proposals from two or more installers applying as a single team to provide a broader spectrum of products and/or increased installation capacity, companies that cover all products internally, and companies that specialize in any subset of the products and services covered by the program.

The selected installer(s) will work collaboratively with Sustainable Westchester to implement a marketing and outreach campaign, starting in September 2025 and lasting for 12 months, ending in September 2026. The selected Installer(s) will receive leads and will be actively promoted to the community as Sustainable Westchester competitively selected Installer(s).

2. ABOUT ENERGYSMART HOMES

Sustainable Westchester, a leading inter-municipal organization specializing in delivering innovative sustainability aggregation programs to its forty-four municipal members, has assembled a team of clean energy experts and implementation partners (“EnergySmart Homes Team”) for the EnergySmart Homes Program.

Heat pump and building efficiency technologies are proven and effective in increasing resident health and comfort and reducing energy costs. Homeowners often lack sufficient understanding of how these technologies operate and which choice would be appropriate for their home, so there is an ongoing need for homeowner education. As a trusted third party and community entity, Sustainable Westchester simplifies the customer experience by providing public education and facilitating enrollee experiences in a coordinated process that is comprehensive for building envelope, space heating, and domestic water heating technologies.

3. SUMMARY OF CAMPAIGN ACTIVITIES

The selected EnergySmart Homes Installer Partners will be promoted and act as partners for the EnergySmart Homes 2025-2026 campaign. The program will generate customer leads through enrollment in the EnergySmart Homes Program that are then dispersed to the participating installers who contact prospective customers, assess needs, and offer product solutions. In this effort, our success is linked to the business success of our participating installers. This is the basis of our partnerships.

To supplement funding for this program and be able to offer additional campaigns on a self-sustaining basis, EnergySmart Homes includes a success fee paid by the selected Installer(s) for projects contracted through Sustainable Westchester. This fee is described in [Section 5, Scope of Services](#).

A successful EnergySmart Homes Campaign will leverage committed and well-connected volunteers and community leaders, particularly in identifying creative and effective ways to get the word out to their community about EnergySmart Homes. Volunteers and Sustainable Westchester will work collaboratively on a variety of tailored outreach approaches. The goal is to encourage as many homeowners as possible to consider installing CH&C systems, especially those who may not have previously considered it, and increase homeowner familiarity with CH&C technologies - and energy efficiency measures in general - to displace fossil fuel-based heating and cooling systems.

The objective of the EnergySmart Homes program is to significantly ramp up the rate of CH&C system adoption and energy efficiency solutions in Westchester by creating and servicing a demand for clean energy options in home heating and cooling. The EnergySmart Homes Program will accomplish this by encouraging positive public conversations about CH&C adoption throughout our region and demonstrating CH&C success stories.

The success of the Solarize, Energize, HeatSmart and similar programs inspired the EnergySmart Homes. For examples of other community-based CH&C programs, see the HeatSmart Tompkins program in Tompkins County, NY and HeatSmart Mass in various communities within Massachusetts, as well as the first EnergySmart Homes Pilot Campaigns in the selected community coalitions of Bedford-Lewisboro-Pound Ridge and Dobbs Ferry- Hastings in 2021.

Installers will benefit from the EnergySmart Homes team's expertise in outreach, education, and customer support, which may include:

- Sharing the Installer Partner List with residential leads via email, at events, and digital outlets;
- Creating campaigns with community partners to target specific geographic locations or municipalities in Westchester County;
- Hosting in-person and virtual informational CH&C events to educate customers on technologies, incentives, and connecting them with Installers;
- Promoting the Installer Partner List on the Sustainable Westchester website, social media, and newsletter;
- Providing ongoing support via email or phone to leads and customers before, during, and after installation;
- Promoting social media spotlight campaigns for each individual Installer.

4. INSTALLER ELIGIBILITY

At a minimum, Installers submitting a response to this RFP must meet the following eligibility requirements to participate in this EnergySmart Homes Campaign:

1. Hold all relevant licenses, insurances and other requirements for the jurisdiction(s) served by the EnergySmart Homes Campaign.
2. Heat pump contractors must meet eligibility requirements for and be approved as a Participating Contractor with Con Edison, NYSEG, the New York State Clean Heat Statewide Program.
3. Meet eligibility requirements for or be approved as a participating Installer in relevant NYSERDA program opportunities, including:
 1. Single Family Residential, Comfort Home, Empower +
 2. Appliance Upgrade Program (AUP)
 3. NYS Clean Heat Contractor for ASHP, GSHP and HPWH.
4. Have completed a minimum of 40 installations within New York State.
5. Be willing to work in coordination with any other selected Installer(s) (if applicable) for lead management, outreach activities and / or installations within the areas served by the campaign.
6. Be willing to work with the EnergySmart Homes team and share data on completed projects (including final project costs) to determine success fees. **See “Scope of Services” for more information.**
7. For heat pump and electric appliance installers, have an electrician on staff or be able to subcontract to an electrical contractor. Any electricians performing the work should have the necessary licenses and certifications for doing work in Westchester.
8. For HPWH and any relevant appliance installers, have a plumber on staff or be able to subcontract to an electrical contractor. Any plumbers performing the work should have the necessary licenses and certifications for doing work in Westchester.
9. Submit a complete proposal containing all required information described in “Section 7. Proposal Requirements” on **June 13, 2025 by 5:00 p.m.**

5. SCOPE OF SERVICES

The scope of services to be provided by Installers participating in Sustainable Westchester’s EnergySmart Homes Program are as follows:

Outreach and Education: Participating Installers will be responsible for working closely with Sustainable Westchester to directly support marketing and outreach activities to promote awareness of the EnergySmart Homes Campaign. This may include:

- Collaborating with Sustainable Westchester to refine the campaign marketing strategy and activities prior to the launch of the campaign and over the course of the campaign;
- Participating in in-person educational “meet the Installer” events, where the Installer will have the opportunity to meet and collect sign-ups from customers;
- Participating in other public in-person events coordinated by Sustainable Westchester;
- Working with Sustainable Westchester to ensure that campaign staff and volunteers are familiar with the Installer’s technology, operations, and workflow;
- Addressing inquiries from prospective customers and Sustainable Westchester;
- Providing information to prospective customers about relevant technologies, incentive programs, and other initiatives supported by the EnergySmart Homes Program;
- Supporting other relevant marketing, outreach, and educational activities (e.g. providing content for marketing materials, developing stories, etc.).
- Participating in available Cooperative Marketing funds, from NYSERDA, manufacturers and distributors, etc, to leverage advertising co-funding. This may include working with Sustainable Westchester to harness manufacturer participation benefits such as cost-share, renting the heat pump demonstration truck, and sharing marketing materials (i.e., stock collateral photos and printed materials).

Installation Services: Participating Installers will provide site visits, quotes, and installation services in a timely fashion to program participants. This shall include:

- Conducting outreach to customers to screen customer suitability for relevant technologies;
- Providing assessments to evaluate a site’s suitability for relevant technologies, including any structural, electrical, mechanical or health and safety issues;
- Completing heating/cooling load calculations (e.g. Manual J) using industry best practices and ACCA-approved software, if applicable;
- Providing pricing quotes to customers promptly after completion of a site visit, which shall reflect pricing consistent with information provided in the Installer’s Pricing Proposal;
- Providing information to customers about all relevant incentives, as well as basic information on system financial analysis and energy savings potential;
- Installing relevant technologies that meet the minimum requirements for eligibility for relevant NYSERDA and New York State Clean Heat Statewide Heat Pump incentive programs;

Note: If Applicant seeks to install equipment that does not meet the eligibility requirements for these incentive programs, Applicant shall provide this information in the proposal materials, as well as reasoning for including equipment and how it will be presented to customers.

- Providing turnkey contracting, permitting, installation, and all other activities associated with the sales and installation process within one year of contract signing, unless mutually agreed upon with the customer;
- Completing incentive paperwork and providing support for completing financing paperwork (if applicable) for all customers who sign contracts;
- Providing clear communication to customers about installation timeline, expected pricing, and any anticipated delays.
- Selected Installers will also be asked to provide standardized, transparent pricing for the technologies they will install (see Attachment D). Pricing proposals from installers that are not selected to serve in this EnergySmart Homes Campaign will be kept confidential.

Lead Management and Reporting: Participating Installers will manage customer leads, track data on leads, and work with Sustainable Westchester to provide regular reporting so that Sustainable Westchester is apprised of the status of customers participating in the program. This shall include:

- Tracking and managing leads to provide timely customer service to all interested leads;
- Developing a process in collaboration with Sustainable Westchester and other Installer(s) to manage leads that are not suitable for the technology and, if relevant, share leads with other Installer(s) if the site is not suitable for the Installer's technology;
- Providing contact information for leads generated during the course of the campaign with Sustainable Westchester;
- Providing data on lead status on a monthly basis to Sustainable Westchester;
- Participating in one annual meeting with members of Sustainable Westchester;
- Keep the EnergySmart Homes Team informed of any staffing or operational changes to ensure the team has up-to-date information.

All prospect contact information acquired as part of the EnergySmart Homes Campaign can be used by the Installer only for the EnergySmart Homes Campaign and not for any other purposes. *Contact names may not be provided or sold to a third party.* All leads must be provided to the Program Administrator as requested and at the end of the Campaign.

6. SUCCESS FEE PAYMENT

Success Fee Payment: Participating Installers will pay Sustainable Westchester a success fee for completed projects originating from Sustainable Westchester referrals. Qualified referrals are homeowners who made contact with Sustainable Westchester at any time before the contractor's engagement. This includes leads that originated with Sustainable Westchester prior to 2025. This applies for referrals occurring in all towns, cities, villages, and hamlets in Westchester.

Success Fee Structure: Contractors selected will be required to pay a success fee after the completion of each project resulting from a qualified referral from Sustainable Westchester EnergySmart Homes. Contractors will pay a success fee of 4% of the total project cost or a fixed fee of \$500, whichever is less.

Tracking Process: Each month, contractors must provide a Monthly Lead List for all their new leads originating within Westchester County during that month. The Monthly Lead List must include the following for each lead:

- Client name
- Client email
- Address of installation site
- Date of lead origination
- Project type

Each quarter, Sustainable Westchester and the contractor will meet to compare lists of leads, referrals, and completed projects. Both parties will reconcile discrepancies and agree on all qualified EnergySmart Homes referrals. For customers that are determined as qualified referrals and result in completed projects, contractors are required to submit a Quarterly Completed Projects Report. The Completed Projects Report must include the following information for each project completed within that quarter:

- Client name
- Client email
- Date of lead origination
- Project type
- Date of installation completion
- Total project cost
- Incentives applied

Monthly Lead List and Quarterly Completed Projects Reports must be submitted to Sustainable Westchester at Megan@sustainablewestchester.org.

Billing Process: After receiving the contractor's Quarterly Completed Projects Report, Sustainable Westchester will issue a Success Fee Quarterly Invoice to the contractor. Payments may be made via check or transfer funds via ACH to Sustainable Westchester covering all EnergySmart Homes projects for which the Installer substantially completed installation since

any prior invoicing period. The success fee must be paid to Sustainable Westchester within 30 days of receiving the Success Fee Quarterly Invoice.

7. EMPOWER +

Sustainable Westchester welcomes contractors participating in the NYSERDA EmPower+ Program to apply to this RFP. Empower+ contractors bring valuable expertise in weatherization and heat pump upgrades, which align with the broader mission of EnergySmart Homes to reduce fossil fuel use, and, as guided by the CLCPA, deliver at least 35% of benefits to disadvantaged communities.

By participating in the campaign, EmPower+ contractors will have the opportunity to engage in the campaign’s outreach and marketing efforts and be included in the installer network promoted through EnergySmart Homes.

No success fee payments will be required for projects involving EmPower+ customers. This exemption recognizes the unique funding structure of the EmPower+ Program and ensures that participating contractors can focus on delivering high-quality energy efficiency services without additional financial obligations.

For more information on the NYSERDA EmPower+ Program, including eligibility requirements and available incentives, please visit [NYSERDA’s official page](#).

8. RFP AND PROGRAM TIMELINE

Please note that the dates provided below are estimates and subject to change.

EnergySmart Homes Campaign Milestones	Date
RFP Released	Tuesday, May 13, 2025
Written Questions Due	Friday, May 30, 2025 at 5:00pm
PROPOSALS DUE	Friday, June 13, 2025 at 5:00pm
Applications Reviewed by the Selection Committee and Potential Installer Interviews	June - July 2025
Installer(s) Announced	August 2025
EnergySmart Homes Campaign Launch Press Release <ul style="list-style-type: none"> ● Installer(s) – Community Team Meetings ● Campaign Public Outreach and Education Events 	September 2025

<ul style="list-style-type: none"> ● Deadline for Participants to Sign Contracts 	
Campaign Ends	September 2026
Potential effort to extend contracts based on market feedback and performance	May 2026

9. PROPOSAL REQUIREMENTS

Installer Proposals (submissions in response to this EnergySmart Homes RFP must include the following documents:

- **Attachment A: Proposal Checklist**
- **Attachment B: Individual Application Form** – If you are submitting a proposal as a team with multiple Installers, each participating Installer must complete this application.
- **Attachment C: Core Proposal**
- **Attachment D: Pricing Proposal**

Proposals must also include the following documents. If you are submitting a proposal as a team with multiple Installers, each participating Installer must include this information.

- **Addendum 1: Example customer project proposal and contract**
- **Addendum 2: Sample marketing materials**
- **Addendum 3: Relevant licenses of key members of the Installer team**, including any subcontractors if necessary.

10. APPLICATION INSTRUCTIONS

Written questions may be submitted to Megan@SustainableWestchester.org by Friday, May 30, 2025 at 5:00 PM. Responses will be sent to Installer candidates that register to RFP updates by completing the form [here](#).

All proposals must be received by 5:00 p.m. on Friday, June 13th, 2025. Late proposals may be rejected without review by Sustainable Westchester Selection Committee.

11. EVALUATION CRITERIA

To be evaluated by the EnergySmart Homes Selection Committee, the Applicant must meet all eligibility requirements described in [Section 4. Installer Eligibility](#). Proposals that do not include all required information may not be reviewed by the Selection Committee at its sole discretion.

Proposals will be evaluated by the Selection Committee in accordance with the criteria listed below. Additionally, at the discretion of the Selection Committee, applicants may be invited to interview with the Selection Committee and provide a brief presentation on their firm's qualifications to serve the campaign:

- **Overall Quality and Value:** Overall quality of the proposal and specified equipment.
- **Experience:** Degree of Installer's experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing all relevant technologies included in the Installer's proposal, record of customer service, and experience working within the region.
- **Outreach and Marketing Plan:** Ability of the proposed outreach and marketing activities to drive community adoption of relevant technologies and reduce costs of installations.
- **Collaboration:** Ability of the Installer candidate to collaborate with Sustainable Westchester and any other selected Installers (if applicable) to implement a successful outreach and education campaign focused on all relevant technologies.
- **Capacity and Implementation:** Ability to provide timely, quality customer service and installations throughout the duration of the program, as well as ability to work with Sustainable Westchester. Ability of Installer(s) to educate customers on benefits of technologies and communicate options available.
- **Pricing Proposal:** Quality, simplicity, clarity, and value of the proposed equipment, price adders, and contract terms.

12. GENERAL CONDITIONS

Indemnification

Installer(s) will list as an additional insured the partner organizations and participating communities and will protect, indemnify and hold harmless all members of Sustainable Westchester, including the procuring entity, and their officers, directors, employees, agents, and affiliates from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, experts' and attorneys' fees and expenses) imposed upon, incurred by or asserted against EnergySmart Homes Team members, resulting from, arising out of or relating to the Installer's work completed through EnergySmart Homes. The obligations of the Installer(s) under this indemnity will survive the expiration or termination of the EnergySmart Homes Campaign and / or EnergySmart Homes Program and are not limited by any insurance coverage required under this RFP.

Insurance

Throughout the duration of the EnergySmart Homes Campaign, including the period during which the Installer is installing systems under contracts entered into during the EnergySmart Homes Campaign, the Installer must maintain insurance of the types and in the amounts specified in the NYSERDA Home Performance and/Statewide Clean Heating and Cooling Program Manual requirements, as applicable to the type of work being performed.

Such insurance must be evidenced by insurance policies, each of which (i) names Sustainable Westchester, Inc as additional insured, and (ii) provides that such policy may not be canceled or modified until at least 30 days after receipt by Sustainable Westchester of written notice thereof. Proof of this coverage will be provided by the Installer once the Installer is selected to serve as an EnergySmart Homes Installer.

Suspension / Termination

Installer agrees that if at any time throughout the project the Installer is suspended or terminated from any of the NYSERDA programs, all work and or services will immediately cease unless otherwise directed by Sustainable Westchester. It is Sustainable Westchester's discretion to determine a course of action following this removal. All leads generated through the EnergySmart Homes Campaign are owned by Sustainable Westchester and must be provided at time of removal.

Limitation of Liability

All members of Sustainable Westchester and the participating EnergySmart Homes municipalities shall not be liable to the Installer(s) for any special, indirect, incidental, consequential, punitive, or exemplary damages of any kind whatsoever, whether based on contract, warranty, tort (including negligence or statutory liability), or otherwise.

Non-Discrimination

Installer(s) agrees and warrants that they will not discriminate or permit discrimination against any person or group of persons in any manner prohibited by the laws of the United States or of the state of New York.

Waiver Authority

Sustainable Westchester reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and / or to cancel all or part of this RFP at any time prior to Installer selection.

Confidentiality Statement

Proposal documents are generally considered to be a matter of public record once the contract for work has been awarded. Sustainable Westchester will endeavor to keep information confidential if the proposer marks the subject information as confidential (including pricing proposals for all applicants that are not selected for the EnergySmart Homes Program),

provided that the matters are withheld from the public are in such a manner as to leave no discretion on the issue.

Disclaimer

This RFP does not commit Sustainable Westchester to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. Sustainable Westchester reserves the right to accept or reject any or all proposals received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.