



Clean Heat for All
**Packaged Terminal
Heat Pump Program**
(PON 5907)



NEW
YORK
STATE

NYSERDA

Informational Webinar | 12.12.24

Meeting Procedures

- Webinar will be recorded
- All attendees are muted upon entry
- Questions may be submitted in writing through the Q&A feature at any time during the event
- The chat feature will be disabled
- Webinar recording and Q&A document will be posted to: <https://nyserda.ny.gov/All-Programs/packaged-terminal-heat-pump-program>

Agenda

1. Packaged Terminal Heat Pump Program Overview
2. Who Should Submit Proposals
3. PTHP Product Overview
4. Funding
5. Pre-Proposal Market Engagement
6. Proposal Requirements & Process
7. Q&A

Clean Heat for All:

Packaged Terminal Heat Pump Program

A \$10 million NYSERDA investment to support the development and demonstration of high-efficiency, cold-climate Packaged Terminal Heat pumps that:

- Compatible with existing wall openings
- Use will not require street or building electric upgrades
- Have high-efficiency, cold-climate operation
- Possess flexible condensate management approaches for diverse building needs
- Improve indoor air quality by delivering outdoor air with energy recovery capability



The Original Clean Heat for All Challenge

The Clean Heat for All: Packaged Terminal Heat Pump Program builds off the success of the Clean Heat for All Challenge.

This challenge was a partnership between the **New York City Housing Authority** (NYCHA), the New York Power Authority (NYPA) and **NYSERDA**.

The packaged window heat pumps developed for the challenge at NYCHA's Woodside apartments delivered over **75%** heating energy savings per square foot in the first winter heating season.

The success of the NYCHA demonstration helped to validate the potential for decentralized, cold-climate heat pump solutions and inspired the PTHP Program.

The PTHP Program will consist of 3 components to support product development, demonstration and market adoption

1

Manufacturer Partnerships (Active)

\$10 million in funding to support product development and field testing of new or modified packaged terminal heat pump equipment.

Proposals due:
February 20, 2025

PON 5907

2

Building Owner Partnerships (Q1-Q2 2025)

NYSERDA will issue a non-funded RFQL to recruit building owners and sites to be qualified as potential sites for field demonstrations

RFQL 5937

3

Early Adopter Incentives (~2027)

Eligible PTHP products that have completed successful field demonstrations will have access to a future early adopter incentive program.

Program details to be announced at a later date.

PTHP Overview

NYSERDA is seeking solutions designed to retrofit or replace existing room conditioning products in the following 3 categories - manufacturers are encouraged to propose to one, or more, of these categories:

1. Standard Size PTACs



2. Hydronic Heat PTACs



3. Through-the-Wall ACs



Who should submit proposals?

NYSERDA invites proposals from **heat pump manufacturers, start-ups or other entities capable of developing, demonstrating and scaling production** of Packaged Terminal Heat Pumps

Building owners and operators, heat pump service providers, engineering/design firms

Owners will be able to apply to RFQL 5937 when it releases in early 2025!

Funding: Up to \$1,250,000 per product is available to support **product development** and **field demonstration**

Product Development Support

- One time product development grant of **up to \$250,000 per product**, per awarded manufacturer.
- **Eligibility:** *Manufacturers proposing new product development or modification of existing equipment are eligible for product development grants.*
- 25% of awarded funds will be distributed upon successful contract execution, 50% at final prototype specification release to NYSERDA and 25% upon NYSERDA receipt and approval of **3 laboratory testing reports** per product.

Field Demonstration Support

- **Up to \$1,000,000 per product**, per awarded manufacturer.
- **Eligibility:** *Manufacturers awarded product development funding as well as those with commercially available products are eligible for field demonstration support.*
- Up to 100% NYSERDA cost-share is available for eligible expenses.
- Demonstration funding will be distributed on a cost-reimbursable schedule

Pre-Proposal Market Engagement

Manufacturers are encouraged to engage with interested building owners prior to submitting a proposal to refine their response to the Site Requirements and develop relationships with potential demonstration partners. Suggested activities:

Program Launch Workshops

Workshop 1

January 7th, 2025

9:30 am – 12:00 pm ET

Workshop 2

February 4th, 2025

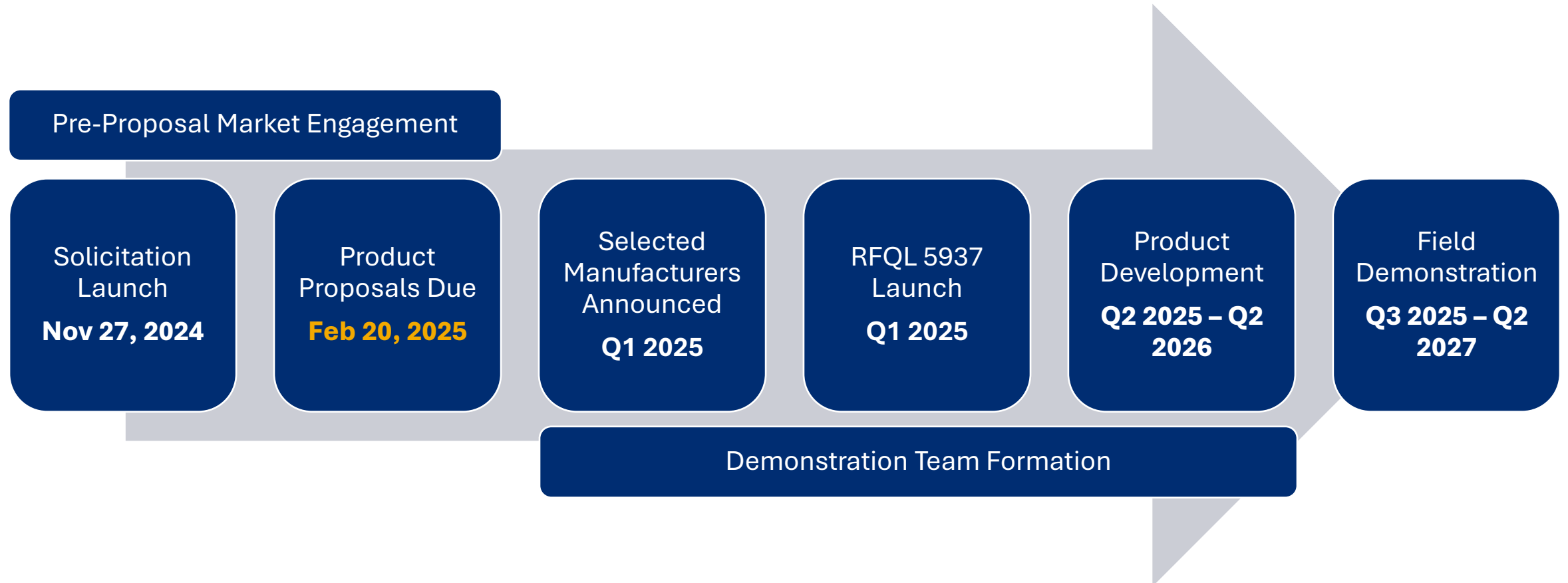
9:30 am – 12:00 pm ET

Site Visits

Manufacturers are encouraged to schedule site visits to buildings with through-wall openings to take measurements, identify potential issues and engage in conversations with building operators to better understand site requirements.

Email PTHPprogram@nyserda.ny.gov to request to attend workshops or to be introduced to interested building owner to arrange for building site visits.

Proposal Process



Proposal Requirements Overview

How to submit:

- Submit proposals via the “Apply Online” link on [Clean Heat for All: Packaged Terminal Heat Pump Program](#)
- **Proposals due February 20th, 2025 by 3:00 p.m. ET**
- RFQL 5937 is not yet open, will open in early 2025

What to include in your proposal:

- Proposed PTHP Product
- Manufacturer Qualifications
- Project Team & Timeline
- Market Scaling
- Budget & Requested Program Funding

Proposal Requirements: Details

Proposed PTHP

1. Detailed technical proposal responsive to the product specifications outlined in [Attachment A - Product Specifications](#).
 - a. Outline category of PTHP being proposed and whether the product is a new, a modification of an existing product or commercially available product with no program-driven modifications.
 - b. Clearly state whether the proposed product meets, or exceeds, the technical requirements outlined in Attachment A. **Proposers should explain the reasoning for unmet technical requirements.**
 - c. Describe a comprehensive testing strategy for the PTHP product(s) to represent real world operations in NYS climates and building installations.
2. Description of demand-side market engagement and research that informed the Proposer's technical proposal.

Proposal Requirements: Details

Manufacturer Qualifications

1. Company background and relevant PTAC/PTHP and related cold-climate heat pump product experience.
2. Demonstration of manufacturing capacity and financial resources necessary to scale PTHP production to meet potential NYS market demand.

Project Team & Timeline

1. Identify primary point of contact and key personnel that will be involved with the program.
2. Project timeline and milestones for product development and field demonstration.

Market Scaling

1. Outline the predicted size of the addressable market for proposed PTHP product in NYS and nationally and describe how this market was identified and the strategy to scale adoption of the PTHP in this market.

Proposal Requirements: Details

Budget

1. Budget breakdown for each product development stage, and estimated manufacturer planned investment in product development, demonstration and market scaling.
2. Forecasted cost for prototype and production PTHP units.
3. Requested NYSERDA funding amount for product development in USD, with breakdown of how funding will be utilized. (up to \$250,000 per product)
5. Requested NYSERDA funding amount for field demonstrations in USD, with breakdown of how funding will be utilized.* (up to \$1,000,000 per product)
 - a. Estimated total number of PTHP units to be supplied for field demonstration.

**It is at the discretion of awarded manufacturers how much, if any, program funding is provided to demonstration partners for make-ready work.*

Evaluation Criteria

Proposals will be evaluated by PTHP category. NYSERDA reserves the right to select as many or few manufacturers in each category as deemed appropriate to achieve the goals of the Program.

Evaluation Criteria:

- Proposed PTHP
- Manufacturer Qualifications
- Project Team & Timeline
- Market Scaling
- Budget

Evaluation Criteria: Details

Proposed PTHP

Meet technical requirements outlined in Attachment A and comprehensive testing strategies to demonstrate real-world operations in NYS climates.

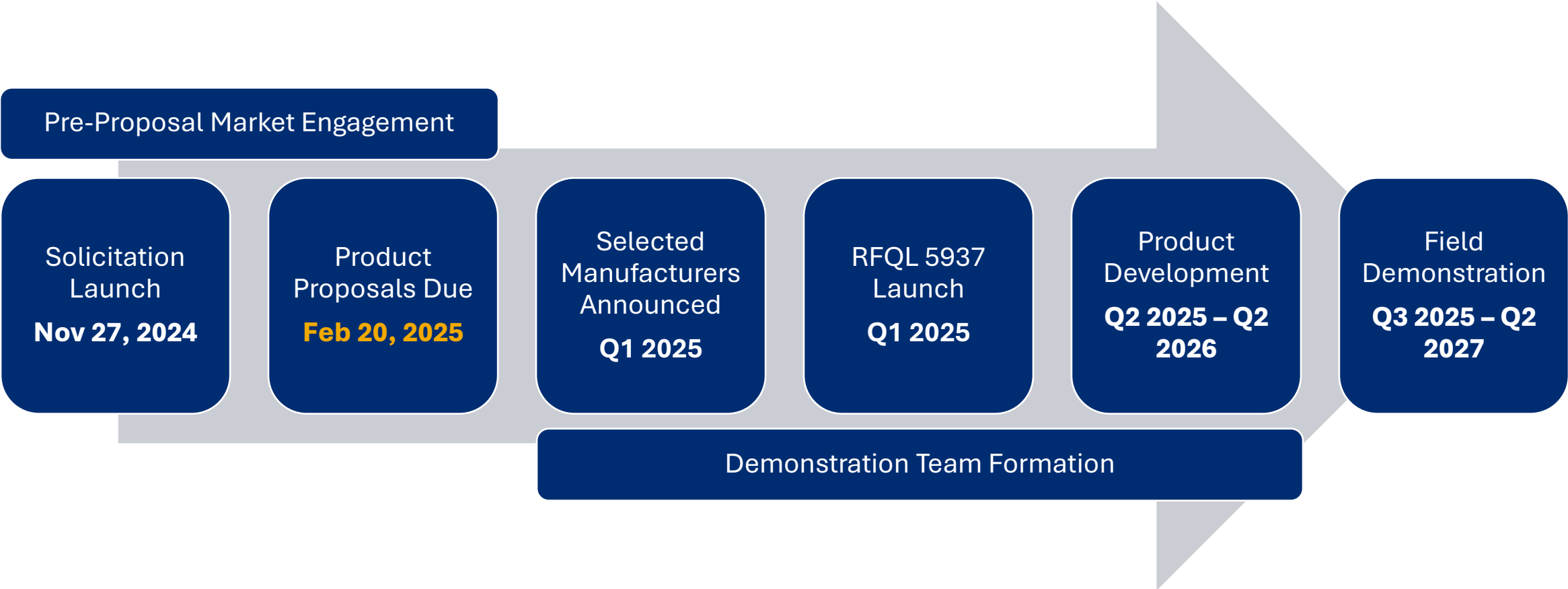
Manufacturer & Project Team Qualifications

Find manufacturers and partners with relevant experience, qualifications and resources required to successfully use NYSERDA funding to develop, demonstrating and scale production of advanced PTHP equipment.

Budget

Show thoughtful consideration of how best to utilize awarded funding to support product development and the implementation of a sufficient number of PTHP prototypes to thoroughly validate the real-real performance of the products.

Proposal Process



Key Points

1. **Proposals due February 20, 2025 by 3 p.m. ET**
2. **Read the solicitation, especially the evaluation criteria**
3. **Address all evaluation criteria in the proposal**

Q&A

- Please type your questions in the Q&A panel
- All questions and answers will be available on the Packaged Terminal Heat Pump Program webpage:
<https://www.nyserda.ny.gov/pthpprogram>
- Send questions to PTHPprogram@nyserda.ny.gov

Thank you

Proposals due February 20, 2025

Program Contacts

Brett Wieland

PTHPprogram@nyserda.ny.gov

Cody Glavey-Weiss

(518) 862-1090 ext. 3621

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