

ADDENDUM NO. 1

Department of Business, Economic Development, and Tourism
Hawaii State Energy Office

HOME ENERGY REBATE PROGRAMS DESIGN AND IMPLEMENTATION PROVIDER

Solicitation No. RFP-24-037-HSEO-EERE

July 16, 2024

This Addendum No. 1 includes changes, omissions, and clarifications to Solicitation No. RFP-24-037-HSEO-EERE (hereinafter referred to as the "Solicitation"). All other terms, provisions, and conditions of the Solicitation published on June 27, 2024, shall remain in full force and effect.

A. The following information is provided as a summary of the Pre-Proposal Conference held virtually on Thursday, July 11, 2024, via Zoom.

Start Time: 10:00 a.m. (HST)

End Time: 10:30 a.m. (HST)

- Pre-Proposal Conference Agenda (attached)
- PowerPoint Presentation (attached)
- Virtual conference recording: [Click for Zoom link](#)
 - Passcode: @8@xsai&

B. The following text **amends** the section "Mistakes in Proposals" on pages 27-28 of the Solicitation (in Ramseyer format):

[3.14] **4.14 MISTAKES IN PROPOSALS**

C. The following text **amends** Section Five: Evaluation Criteria on page 29 of the Solicitation (in Ramseyer format):

[~~The Procurement Officer, or an~~] An evaluation committee of at least three qualified state employees selected by the Procurement Officer, will evaluate proposals.

D. The following procedural questions (clean transcription) were received during the virtual Pre-proposal Conference. As a courtesy to offerors, the corresponding answers to questions 1–9 are provided below for clarification purposes. All other questions regarding the RFP must be submitted via HlePRO by the July 19, 2024, at 2:00 pm (HST) deadline for written questions and will be answered by the deadline for responses published in Section 1.5 RFP SCHEDULE AND SIGNIFICANT DATES of the solicitation:

Q.1: Will all slides be made available after the presentation today?

A.1: All materials discussed here whether it be the presentation, or I believe even a video of this meeting will be available on HlePRO.

Q.2: The RFP makes no mention of system of record or software for this solution. The DOE has strict requirements including software to integrate with PNNL integration. Are you planning to release an RFP for the requirements for a system of record to manage these programs or can we submit a proposal for the system of record.

A.2: We are open to all options at this point, as long as the criteria and the Scope of Work are met.

(**Clarification and References:** Per Section 2.2 of the solicitation, to the extent possible, responses should be informed by USDOE guidance made available on its website: <https://www.energy.gov/scep/home-energy-rebates-programs>. Software requirements are discussed in the IRA Home Energy Rebates: Data And Tools Requirements Guide <https://www.energy.gov/scep/articles/ira-home-energy-rebates-data-and-tools-requirements-guide> and Home Energy Rebate Programs Requirements and Application Instructions <https://www.energy.gov/scep/articles/home-energy-rebate-programs-requirements-and-application-instructions>. Per Section 4.9, to be considered responsive, the Offeror's proposal must respond to and include all items specified in this RFP, inclusive of any modifications and/or additions made by subsequent addendum.)

Q.3: Will one implementer be awarded or will there potentially be multiple awards?

A.3: Our preference is for single, but subs (*i.e.*, *subcontractors*) are allowed. But, our opinion is also we're open to all options. As long as the criteria and Scope of Work are met.

(**Clarification:** There will be one award. The prime contractor may offer a proposal with one or more subcontractors.)

Q.4: In the RFP, Section 4.9-4.10, a comprehensive list of required documents to submit a responsive bid? Or will you release a check list?

A.4: There is an Offer Checklist. It's Attachment 1. It's on page 38 of the RFP.

Q.5: Do subcontractors need to be named in the proposal or can they be added after contract award?

A.5: No (*i.e.*, *subcontractors cannot be added after contract award*). All subcontractors need to be named in the proposal.

Q.6: It sounds like this RFP is for the overall administration of the program. So, someone to administer it on behalf of the State Energy Office. But then other contractors would be involved in implementing the actual home efficiency improvements. Is that a separate

RFP? Wherein contractors who propose to perform - whether it's insulation upgrades, cooling system upgrades, or what sort of efficiency improvements are going to be executed? Can you weigh in on that a little bit?

A.6: Because of the nature of that question, that is one that I think we will defer to respond to in writing to provide more guidance on that just because I don't want to misstate what our opinion, what our thoughts are on that.

Q.7: Is the Scope of Work for this RFP, is in the administration of the program, identifying appropriate candidates for the rebate, and then delivering those rebates to the candidates and then tracking the overall efficacy of this project. Is that correct?

A.7: That's correct. This RFP is for the administration of the program and finding qualified rebate participants administering the rebates, but not to perform any home efficiency upgrades.

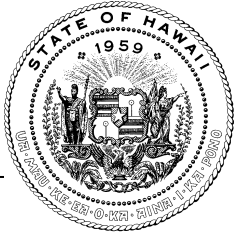
Q.8: You mentioned qualifying contractors. It sounds like, whoever the recipient of this contract, will need to establish a process to onboard contractors in the local population of home service providers and qualify them to deliver services to individual homeowners for which those homeowners can receive the rebate. Is that correct?

A.8: Correct. In the U.S. Department of Energy's guidance on the program, you'll see further clarification on the requirements to be a qualified contractor to be eligible to participate. It will have a little more in there. But yes, that's a requirement from the Department of Energy.

Q.9: With regard to the HEAR program, if there is modeling involved, has a modeling software been identified by your team? I understand it has to be approved by DOE, but have you identified at this point, a modeling software to be used by the contractors that will be involved in modeling in the program?

A.9: In answer to your question, we're going to defer to follow that question up in writing. I believe you said the HEAR program, but I believe it's the HOMES program. My understanding is DOE just released some guidance recently, we're going to answer that question in writing.

(Clarification: The State has not identified any modeling software for use by contractors.)



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STATE OF HAWAII DEPARTMENT OF BUSINESS, ECONOMIC DEVELOPMENT, AND TOURISM HAWAII STATE ENERGY OFFICE

REQUEST FOR PROPOSALS RFP NO. RFP-24-037-HSEO-EERE

HOME ENERGY REBATE PROGRAMS DESIGN AND IMPLEMENTATION PROVIDER

PRE-PROPOSAL CONFERENCE

Thursday, July 11, 2024

10:00 A.M. HST

Via Zoom

<https://us06web.zoom.us/j/83446295881?pwd=eGi0WiWHyML4XiThUdKZQ292Kt6F9v.1>

Meeting ID: 834 4629 5881

Passcode: 415417

AGENDA

- I. Welcome and Introductions
- II. Housekeeping
- III. Home Energy Rebate Program Background
- IV. Scope of Work (Section 2.3)
- V. RFP Schedule and Significant Dates (Section 1.5)
- VI. HIePro Submittal Only (Sections 1.4 and 4.11)
- VII. RFP Procedural Questions & Answers

Hawai'i State Energy Office

RFP-24-037-HSEO-EERE

HOME ENERGY REBATE PROGRAMS DESIGN
AND IMPLEMENTATION PROVIDER

AGENDA

- Welcome and Introductions
- Housekeeping items
- Program overview and Scope of Work
- RFP schedule and significant dates
- HlePro submittal
- Questions and Answers

Housekeeping

- This meeting is being recorded. Continuing participation indicates your consent to be recorded.
- Please mute your line.
- Anything discussed during this call/webinar does not change any part of the RFP. All changes and/or clarifications shall be done in the form of a published Addendum.
- The conference call/webinar will end at 11:00 a.m. or when all Agenda items have been covered. In the event there are remaining questions, they may be submitted in writing.

Home Energy Rebates

Home Efficiency Rebate Program (HER or HOMES)

- Existing single-family and multifamily buildings are eligible
- Retrofits to achieve significant energy savings
- Rebates available to individuals/aggregators that perform upgrades
- States can narrow program eligibility, conditions, and/or technologies than those articulated in law

Home Electrification and Appliance Rebate Program (HEAR)

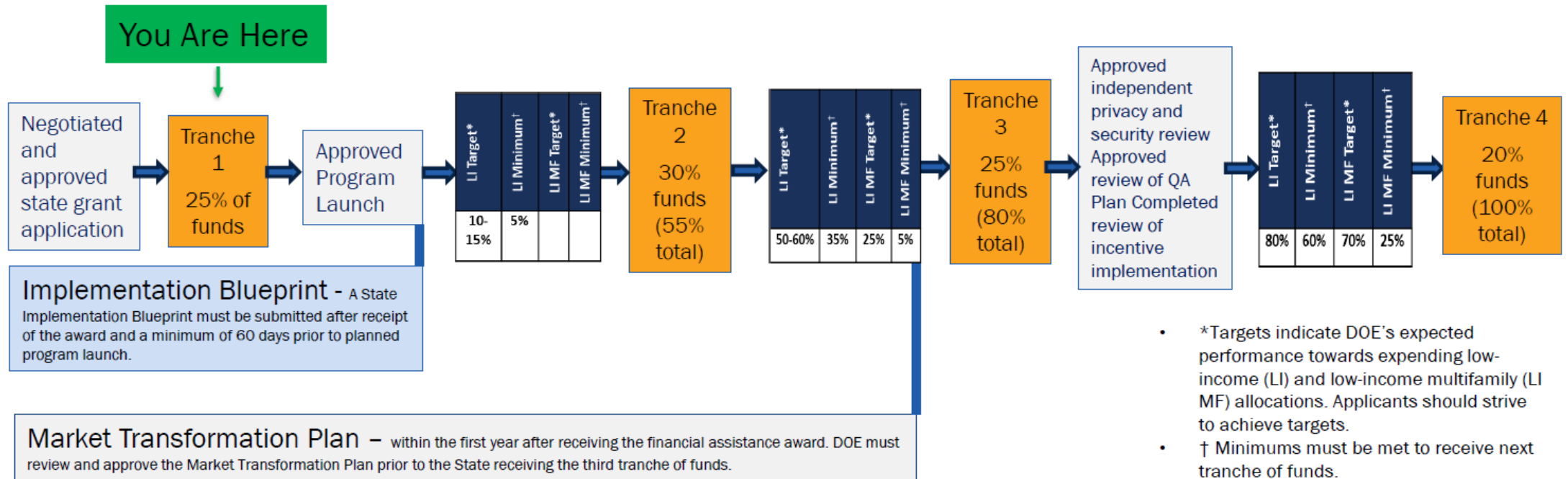
- Entirely income qualified
- May cover up to 100% of total qualified project cost for households with a total annual income less than 80% Average Median Income (AMI)
- States may decide if new construction projects are eligible
- States can narrow program eligibility, conditions, and/or technologies than those articulated in law

Funding Allocations

- Hawai'i's total award allocation is **\$69.8 Million** (split between programs)
- At a minimum, each state must adhere to low-income eligibility considerations for both programs:
 - Allocate a percentage of its rebate funding for each program in line with its percentage of low-income households
 - Hawai'i % of low-income (<80% AMI): 39.8%
 - Minimum allocation: \$10.8 million/per program (**\$21.6 million**)
 - An additional 10% is allocated to serve low-income multifamily buildings
 - Minimum allocation for LI multifamily: \$2.7 million/per program (**\$5.4 million**)



ALRD 2 Tranche Flowchart (HEAR)



Scope of Work (section 2.3)

- Six Tasks
 - TASK 1. PROJECT MANAGEMENT PLAN
 - TASK 2. REBATE PROGRAM IMPLEMENTATION PLANS
 - TASK 3. EXECUTION OF IMPLEMENTATION PLANS TO DELIVER REBATES
 - TASK 4. PROGRAM EVALUATION
 - TASK 5. HSEO REPORTING AND CONTRACT ADMINISTRATION
 - TASK 6. FEDERAL REPORTING

Scope of Work (section 2.3)

- Task 1. Project Management Plan
 - SUBTASK 1.1. INITIAL PROJECT MANAGEMENT PLAN
 - SUBTASK 1.2. UPDATE PROJECT MANAGEMENT PLAN
- TASK 2. Rebate Program Implementation Plans
 - Subtasks in Task 2 will be required for each program, HOMES and HEAR, which may be completed separately.

Scope of Work (section 2.3)

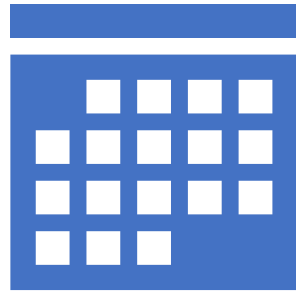
- SUBTASK 2.1. COMMUNITY BENEFITS
- SUBTASK 2.2. EDUCATION AND OUTREACH
- SUBTASK 2.3. CONSUMER PROTECTION AND QUALITY ASSURANCE
- SUBTASK 2.4. UTILITY DATA ACCESS
- SUBTASK 2.5. PROGRAM DATA PRIVACY AND SECURITY
- SUBTASK 2.6. MARKET TRANSFORMATION

- SUBTASK 2.7. COORDINATION WITH OTHER STATE AND FEDERAL PROGRAMS
- SUBTASK 2.8. REBATE PROCESSING SYSTEM INCLUDING INCOME VERIFICATION
- SUBTASK 2.9. HOME ENERGY CONTRACTOR ENGAGEMENT
- SUBTASK 2.10. MULTIFAMILY ELIGIBILITY
- SUBTASK 2.11. USDOE APPLICATION SUPPORT

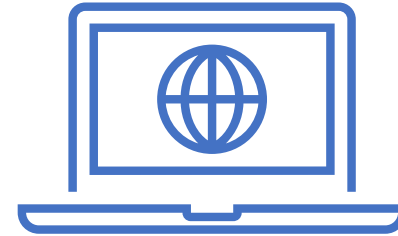
Scope of Work (section 2.3)

- TASK 3. EXECUTION OF IMPLEMENTATION PLANS TO DELIVER REBATES
 - SUBTASK 3.1. DEVELOP PROJECT PLAN FOR REBATE DELIVERY
 - SUBTASK 3.2. EXECUTE AND IMPROVE IMPLEMENTATION PLANS
 - SUBTASK 3.3. PHASED ROLLOUT OF REBATE DELIVERY
- TASK 4. PROGRAM EVALUATION
- TASK 5. HSEO REPORTING AND CONTRACT ADMINISTRATION
 - SUBTASK 5.1. MONTHLY PROGRESS REPORTS
 - SUBTASK 5.2. FINAL REPORT
- TASK 6. FEDERAL REPORTING

Important Reminders



RFP Schedule and Significant Dates



HlePro Submittal

RFP Procedural Questions & Answers

- Please note: questions asked, and answers provided during this session shall be considered informal and do not change the RFP.
- All additional questions must be submitted through HlePRO.
 - Questions must be submitted by **July 19, 2024 2:00 PM (HST)**
 - Answers will be provided via the HlePRO site on **July 24, 2024 4:30 PM (HST)**

Questions and Answers

Please raise your hand or drop your question in the chat.

Mahalo for joining us