

## **Design, Development, and Implementation of Kansas' Inflation Reduction Act Home Rebates Programs.**

### **4. Specifications**

#### **4.1 Introduction:**

The Kansas Energy Office, within the Kansas Corporation Commission (KCC), is requesting proposals to design, develop, and implement both of Kansas' Inflation Reduction Act Home Rebate Programs. Section 50121 of the Inflation Reduction Act created the Home Efficiency Rebate (HOMES) Program, a grant program that allocated \$52,971,870 in funds to the State of Kansas. Section 50122 of the Inflation Reduction Act created the Home Electrification and Appliance Rebates (HEEHR), a grant program that allocated \$52,663,910 in funds to the State of Kansas. At least 40% of the funds from both programs must be distributed to the Disadvantaged Communities (DAC) per Justice 40 guidelines.

Both HOMES and HEEHR programs (collectively, Rebate Programs) are managed under the State and Community Energy Programs (SCEP) office in the Department of Energy (DOE). The Rebate Programs are grant based programs. Pursuant to the current DOE guidance, states must not exceed 20% of the total grant funding on administrative purposes over the total duration of the program, which will end when all funds are expended or September 30, 2031, whichever occurs sooner. Administrative purposes are costs related to planning, administration, and technical assistance of the Rebate Programs. The remainder 80% of the funds must be used to provide single and multi-family households with discounts for energy efficiency upgrades or for high efficiency home appliances and equipment.

DOE announced March 23, 2023, early administrative funds were available to all states. The KCC applied for the funds allocated to Kansas per DOE early administrative fund guidance. The early administrative funds account for 2.5% of the total funding for each program and is permitted to be utilized for planning, administration, and technical assistance, contingent upon DOE approval of the use of the early administrative funds.

The KCC intends to apply for the remainder of the HOMES and HEEHR funding presently allocated to Kansas with the assistance of the awarded Bidder. In addition to the awarded Bidder being responsible for designing and developing both HOMES and HEEHR, the awarded Bidder will be responsible for implementing said programs, while adhering to all of DOE's guidance and requirements.

#### **4.2 Background/History:**

The Kansas Energy Office is a division of the Kansas Corporation Commission (KCC). The Kansas Energy Office administers programs and connects Kansans to objective information about conservation, efficiency, and alternative energy. The Kansas Energy Office works with DOE in annual funding cycles for their State Energy Program (SEP) to administer programs, like the FCIP, small business energy program, and KidWind, and provide energy education materials to Kansans. In addition to the SEP, Kansas Energy Office works with DOE on the distribution of new federal funding allocated from the Bipartisan Infrastructure Law (BIL) and IRA.

Due to the extensive nature of the Rebate Programs under IRA, along with the other numerous DOE federal grants under the BIL and IRA, the Kansas Energy Office recognizes the need for additional assistance to develop and implement a program to effectively distribute the Rebate Programs funds to Kansas residents, while adhering to the DOE requirements and guidance. The Kansas Energy Office intends to work closely with the awarded Bidder to ensure Kansans are served equitably and efficiently.

### **4.3 Scope of Work**

The overarching scope of work is that the Bidder will help develop the application for the Rebate Programs, advise the Kansas Energy Office and stakeholders on DOE guidance for the Rebate Programs, engage stakeholders and other state agencies, develop strategies, meet milestones, and effectively help design, develop, implement, and manage the Rebate Programs.

The scope of work consists of the following tasks outlined below, however, the Bidder is permitted to submit additional information that the Bidder deems pertinent to the successful execution of the Rebate Programs. The following tasks are not all encompassing and could be modified throughout the contract based upon DOE guidance, legislative sessions, and communications with the Kansas Energy Office staff. The Bidder must be willing to design and implement both HOMES and HEEHR. All work submitted must adhere to the DOE's guidance and requirements outlined in the ALRD for Early Administrative Funds and the full ALRD for HOMES and HEEHR.

#### **4.3.1 Task A: Distribution of Resources to Kansas Residents (Market Research & Community Outreach)**

A primary and pressing need that the Kansas Energy Office recognizes is the distribution of resources to Kansas residents interested in the Rebate Programs and to state legislatures. The Kansas Energy Office has received numerous inquiries on both programs since the announcement of the IRA. Bidder should outline their plans to distribute the following resources and any examples of similar successful projects. Bidder should identify in their plans their approach for outreach to disadvantaged communities.

Suggested resources:

1. Online education and outreach resources for Kansas residents
2. Physical copies of education and outreach resources that may be distributed to local jurisdictions to access residents with limited access to online resources
3. Collaboration with other state agencies and low-income based programs.
4. Call Centers

In addition, Bidders should address the following questions in their plans:

1. How will the Bidder promote other federal programs and encourage stacking and braiding with non-federal programs?

2. How will the Bidder track effectiveness of outreach and education efforts and materials? What metrics does the Bidder propose to develop and use to measure effectiveness of education and outreach efforts?
3. How will the Bidder ensure outreach, education, and marketing efforts are reaching the potential eligible program participants?
4. How will the Bidder contact and recruit retailers, contractors, and distributors?
5. What strategy and/or approach does Bidder intend to utilize to educate customers, retailers, contractors, and distributors about HEEHR and HOMES?
6. How will the Bidder support the Kansas Energy Office to facilitate at least one public input session and incorporate feedback into program design?
7. How will the Bidder support the Kansas Energy Office in the development of the Education and Outreach Strategy and plan as required by DOE?

#### 4.3.1.1 Deliverable for Task A:

Include a detailed plan of initial steps in program implementation and resource sharing for Kansas residents, including an outline of their approach for outreach to disadvantaged communities and how they plan to identify disadvantaged communities. Bidder should ensure the plan addresses all of the questions outlined in 4.3.1. Bidders are encouraged to provide recommendations and show previous program success on similar projects. The task will require collaboration with Kansas Energy Office staff and include flexibility as the needs of Kansas residents are recognized throughout the project.

#### **4.3.2 Task B: Program Evaluation and Collaboration with Kansas Energy Office Program Staff**

Bidder will be expected to effectively communicate and collaborate with the Kansas Energy Office program staff throughout the entirety of Rebate Programs process. Kansas Energy Office expects to apply for the remaining funds available for the Rebate Programs with input from the awarded Bidder. Program plans are subject to change as more information is received from the DOE.

Examples of program evaluation and collaboration with Kansas Energy Office program staff includes, but not limited to:

1. Creation of a compliance roadmap based on program needs and DOE guidance.
2. Engagement with external stakeholders and other state agencies to determine needs for residents, manufacturers, distributors, and contractors.
3. Creation of timeline beyond the early administration of the Rebate Programs.
4. Breakdown of requirements for the Rebate Programs, Kansas Energy Staff responsibilities, Bidder responsibilities, and the Bidder must track DOE guidance as it is related.
5. Creation of full application to DOE for the Rebate Programs. Full application is due to the DOE by January 31, 2025.
6. Creation of the implementation blueprint for the Rebate Programs that includes the following plans: Utility Data Access Plan, Education and Outreach Strategy, Consumer

Protection Plan, Market Transformation Plan, and Privacy and Security Risk Assessment.

#### 4.3.2.1 Deliverable for Task B:

Bidder must submit a plan for collaboration with Kansas Energy Office program staff and how they may be adaptable in continuing program evaluations. As DOE releases more guidance on the Rebate Programs, it is imperative that the Bidder remain flexible and up to date on all information to best implement the Rebate Programs and advise the Kansas Energy Office staff. Bidder shall demonstrate its ability to be fluid with DOE changing guidance and requirements. Bidder shall deliver a plan to the to the Kansas Energy Office program staff on application creation, drafting of plans, breakdown of work, and additional support once full application funds are received.

#### **4.3.3 Task C: Advise on IRA Rebate Program Timelines**

To ensure effective and efficient rollout of both the Rebate Programs, Bidder must submit a timeline that highlights key dates and measurable program milestones. With information coming from DOE on a rolling basis, it is critical that the Bidder is able to adjust the timeline as needed and work closely with Kansas Energy Office program staff to ensure work stays on track.

#### 4.3.3.1 Deliverable for Task C:

A timeline of the events that is searchable, summarizing the findings of the Bidder and a detailed timeline and key action items (in document and presentation formats).

#### **4.3.4 Task D: Stakeholder Outreach and Strategy**

Bidder must submit an effective and equitable stakeholder outreach plan and overall program strategy. Stakeholder outreach should include, but not limited to:

1. Community analysis and response
2. Local Trade Group and Contractor Analysis
  - a. Example: Identify and obtain a better understanding of local trade groups and contractors within Kansas. Identify gaps in training and workforce programs.
3. Market analysis for manufacturers.
4. Kansas' current energy efficiency workforce analysis.
5. State of Kansas Program Analysis
  - a. Example: obtain a better understanding of other state agencies and programs that may be able to integrate the Rebate Programs.
6. Engage DOE and state energy offices to understand how they are implementing their programs
7. Explain how the Bidder will engage with the community partners and community organizations.
8. Explain the Bidder's community outreach and engagement strategy.
9. Explain how the Bidder will incorporate workforce education and training into their plans for both the single family and multifamily workforce.
10. Explain how the Bidder will support groups that organize and apply collective bargaining.

11. Explain how the Bidder will effectively identify and promote the Rebate Programs to disadvantaged communities.
12. Explain how the Bidder will identify and engage qualified contractors.
13. Explain how the Bidder will engage with utility companies of various sizes.

#### 4.3.4.1 Deliverable for Task D:

Bidder shall submit a plan and timeline for stakeholder outreach within the state and the purpose for each session or workshop. Bidder shall provide details on potential questions to be asked, how the Bidder plans to track answers, and how results would be analyzed. Bidder are expected to share all results with the Kansas Energy Office and analyze results with the Kansas Energy Office staff.

#### **4.3.5 Task E: Program Plan**

20% of funds for both programs (this includes the early administrative funds) may be used for administrative costs. The early administrative funds (2.5% of the administrative funds allotted to Kansas) must be distributed within two years of funding. Administrative costs include technical assistance to residents and contractors as well. Bidder shall submit a plan on how the Kansas Energy Office may design, develop, and implement the Rebate Programs based on findings from the Bidder's previous work or create a plan as they work with the Kansas Energy Office staff that stay within the 20% administrative budget, with the understanding that some of the administrative funds will be utilized for technical assistances.

#### 4.3.5.1 Deliverable for Task E:

Bidder shall submit a timeline with specific deliverables for each of the Rebate Programs design, development, and implementation that includes the role of the Bidder within that plan. The Bidder must outline each step in the timeline and the specific role of the Bidder and the Kansas Energy Office for each step. Bidder must include a budget breakdown of early administrative work and future implementation work. The Bidder shall also include how the Bidder will stay within the 20% administrative budget as laid out by DOE, with the understanding that a portion of the 20% administrative budget will have to be reserved for technical assistance and for administrative costs of the Kansas Energy Office.

#### **4.3.6 Task F: Distributing Funding and Reporting (Program Delivery Plan)**

The Kansas Energy Office recognizes the need for effective tracking of both funding and follow-up reports for the Rebate Programs. Bidder should submit plans on how to effectively, equitably, and efficiently distribute funds and report on distribution results for Kansas residents. The Bidder should outline in their plan the following practices and highlight examples of similar successful projects.

The Bidder should address the following in their plan:

1. How does the Bidder intend to create tracking tools for Kansas residents of funding available?
2. Describe the methodology (and determined software) to calculate the rebate level based on income and energy savings.

3. How will the Bidder determine which upgrades and equipment are eligible for the program and the process s to update the allowable measures?
4. How will the Bidder verify the income levels of the applicants?
  - a. What methods will the Bidder implement to randomly sample applicants to confirm income level?
  - b. What is the Bidder's remediation process if the income level reported was deemed false?
  - c. Will the Bidder utilize the DOE's Rebate Reservation and Tracking API? If not, what program does the Bidder intend to use to verify income and the experience for the household?
5. Explain how the Bidder plans to create resources that may be accessible to Bidder and Kansas Energy Office to track funding.
6. Explain how the Bidder plans to create resources that may be accessible to Bidder and the Kansas Energy Office to track reporting used for internal resources and DOE requirements.
7. Describe how the Bidder will work with Kansas manufactures, distributors, contractors, and other state agencies to effectively, equitably, and efficiently distribute funds and implement projects.

#### 4.3.6.1 Deliverable for Task F:

Bidder shall submit a work proposal on the required resources and needs for Kansas residents and create a detailed plan based on the current DOE guidance and data & tool requirements for the Rebate Programs. Bidder shall include an explanation on the Bidder's ability to be flexible with changing guidelines and requirements as released by DOE. Bidder must plan to stay informed on all Rebate Programs guidance updates from DOE.

#### **4.3.7 Task G: Rebate Distribution**

The Kansas Energy Office recognizes that the effectiveness of the rebate processing and distribution is essential to the Rebate Programs success. The Bidder should submit plans describing the following:

1. Provide details on the point-of-sale rebate approach, including:
  - a. What is the process for ensuring that the appropriate rebate is paid based on product and income level?
  - b. How will the Bidder ensure that eligible recipients will receive their rebate at the point of sale?
  - c. How will the Bidder ensure that the total household rebate limits are not exceeded?
2. How will eligible entities be paid installation incentives in a timely fashion?
3. What are the risks to meeting the rebate processing timeframe requirements and how will the Bidder mitigate those risks?
4. How will the Bidder ensure that the household did not receive federal funds for the same equipment or upgrade?
5. How will the Bidder ensure the program is statewide?

6. Is the Bidder proposing to use the DOE rebate AP? If not, what systems will be used for processing rebates?
7. How will the Bidder manage budgets and ensure that funds have not been over-obligated, particularly for the measured program path?
8. How will the Bidder set up multiple pathways to provide rebates either through point of sale or submitted invoice?
9. How will the Bidder ensure rebates meet all program requirements and document those conditions?
10. How will the Bidder manage receiving requests from and providing rebates to customers, contractors, distributors, and retailers?
11. How will the Bidder ensure that the program avoids duplication with other programs?

#### 4.3.7.1 Deliverable for Task G:

Bidder shall submit a plan outlining how the rebates will be processed and distributed while describing and address all of the questions above in Section 4.3.7.

#### **4.3.8 Task H: Compliance and DOE Reporting Requirements**

The Kansas Energy Office recognizes that compliance with the DOE guidelines and requirements, and accurate reporting is an important aspect to the Rebates Program. Bidder should submit plans on how they plan to ensure compliance with the DOE guidelines, Davis-Bacon Act, Build America, Buy America, and any future legislative or regulatory compliance. Bidder should additionally include how they plan to ensure all reporting requirements per the DOE guidelines.

#### 4.3.8.1 Deliverable for Task H:

Bidder shall submit a plan outlining how they plan to ensure compliance with the DOE guidelines, Davis-Bacon Act, Build America, Buy America, and any future legislative or regulatory compliance. Bidder should additionally include how they plan to ensure all reporting requirements per the DOE guidelines. The Bidder should include a workflow of the roles of the Bidder and Kansas Energy Office staff as it relates to reporting to DOE on the quarterly and annual basis.

#### **4.3.9 Task I: Home Assessments, Quality Assurance, and Consumer Protection**

The Kansas Energy Office recognizes that the Rebate Programs requires home assessments and that the DOE has specific requirements on how the home assessments must be completed. Additionally, quality assurance and consumer protection are both the utmost importance to ensure Kansans are protected. The Bidder must identify and describe their plan to complete home assessments and ensure quality assurance and consumer protection is met. The Bidder should describe the following in their plans:

1. How will the Bidder ensure the limited home assessment process is applied for qualified electrification projects?
2. How will the Bidder review and validate home assessments to ensure they meet all of the DOE requirements?

3. Describe the process for and how the Bidder will ensure all required information is collected during the home assessment.
4. Describe how the Bidder will alert customers that an electrification project may result in a higher utility bill and develop a threshold for when there is an unacceptable risk of a higher bill?
5. How will the Bidder review and validate home assessments for accuracy?
6. How will the Bidder develop a system to collect and respond to customer feedback?
7. How will the Bidder address dispute resolution? What is the Bidder's proposed approach for conflict resolution and remediation?
8. What is the Bidder's proposed approach for onsite inspections to meet DOE requirements?
9. How will the Bidder qualify contractors as eligible, identify required qualifications, and have a process for delisting contractors if necessary?
10. How will the Bidder develop installation standards and a process to enforce those standards?
11. How will the Bidder incorporate continuous improvement, developing processes for identifying problem areas and fraud/waste?
12. How will the Bidder work with a third-party to develop systems for providing households with a Post-Installation Certificate after quality assurance has taken place on their upgrade?

#### 4.3.9.1 Deliverable for Task I:

Bidder shall submit a plan outlining their methodology for home assessments, quality assurance and consumer protection that describes their processes and explains how they will meet the DOE requirements. The Bidder is encouraged to provide any examples and recommendations.

#### **4.3.10 Task J: Data and Security Requirements**

The awarded Bidder will have access to an abundance of confidential information and it is important that the Bidder have adequate data and security requirements. The Bidder shall submit a plan outlining their data and security requirements, in addition to addressing the following:

1. Describe the Bidder's cybersecurity protocols and how information will be stored securely.
2. Describe the Bidder's risk-based security controls.
3. Provide confirmation that the security and privacy controls have been reviewed by an independent party in the last three years.
4. How will the Bidder meet the data collection requirements in the DOE Data & Tools Requirements Guide?
5. Will the Bidder use the DOE/PNNL rebate reservation and tracking API or another system?
6. If using the DOE/PNNL, how will the Bidder incorporate these workflows and API into the program?
7. If using a different system, what is the system and how will the Bidder ensure the system meets all of DOE data and program requirements?
8. Does the Bidder have data transfer abilities and protocols in place to utilize APIs and HPXML?

#### 4.3.10.1 Deliverable for Task J:

The Bidder shall submit a plan outlining their data and security requirements that ensures all DOE requirements are met.

#### **4.4 Expectations and Responsibilities of Awarded Bidder**

In addition to the Scope of work (Section 4.3), the awarded Bidder will have the following expectations and responsibilities. These expectations and responsibilities are not all encompassing and could be modified throughout the contract based upon DOE guidance, legislative sessions, and communications with the Kansas Energy Office staff. The Bidder shall outline in their proposals how they can meet each of the expectations and responsibilities.

- 4.4.1. Grant Application Preparation. The awarded Bidder shall review all requirements and guidance from DOE for the Rebate Programs to prepare the grant applications for the Rebate Programs. This includes, but not limited to: all necessary plans, narratives, and data and tool requirements. The awarded Bidder shall communicate and obtain approval from the Kansas Energy Staff before any submission to DOE.
- 4.4.2. Subcontractor Management. The awarded Bidder shall manage all aspects of any of their subcontractors, and maintain a network of subcontractors who have adequate staffing capacity and experience to meet the needs of the Rebate Programs. The awarded Bidder shall ensure the subcontractors comply with all of DOE guidance and reporting requirements.
- 4.4.3. Reporting. The awarded Bidder shall be responsible for coordination, compilation, validation, and submittal of all required reports and data, including but not limited to: internal reports to the Kansas Energy Staff and KCC, external reports to the DOE, and external reports to stakeholders and residents. The awarded Bidder will be responsible for working with the Kansas Energy Staff to define all reporting requirements, including but not limited to: internal reports to track the Rebate Programs progress and health; DOE and other federal reporting requirements; or reporting to stakeholders.
- 4.4.4. Grant Disbursement. The awarded Bidder shall be responsible for the review, quality assurance, and disbursement of the rebates to the Kansas residents. The awarded Bidder shall be responsible for the collection of all required documents and supporting materials; and the retention and support of that documentation according to the DOE and State of Kansas retention rules.
- 4.4.5. Financial Tracking. Any spending associated with the Rebate Programs shall be tracked against budgets and projections and reported to the Kansas Energy Office staff in an agreed upon format and timeframe.
- 4.4.6. Davis-Bacon Act Compliance. The awarded Bidder shall ensure compliance with the Davis-Bacon Act, as it applies to the Rebate Programs. The awarded Bidder shall ensure subcontractors are thoroughly aware of the requirements, and shall monitor and QA/QC their data. Additionally, the awarded Bidder shall provide the Kansas Energy Office all data for approval, and provide the needed information to DOE in the format and timeframe required.

- 4.4.7. Build America, Buy America Compliance. The awarded Bidder shall ensure compliance with the Build America, Buy America, as it applies to the Rebate Programs. The awarded Bidder shall ensure subcontractors are thoroughly aware of the requirements, and shall monitor and QA/QC their data. Additionally, the awarded Bidder shall provide the Kansas Energy Office all data for approval, and provide the needed information to DOE in the format and timeframe required.
- 4.4.8. Document Management and Retention. The awarded Bidder shall ensure that they and all their subcontractors retain documents according to the State of Kansas and DOE retention requirements.
- 4.4.9. Training (Including subcontractors). The awarded Bidder shall ensure proper training of their own staff and all relevant subcontractor staff to deliver the services required by the Rebate Programs.
- 4.4.10. Enabling Technology and Oversight. The awarded Bidder shall ensure their staff and all subcontractor staff are aware of, and comply with, all relevant Kansas and U.S. federal government information technology security requirements. The KCC shall own all data regardless of the system in which it is stored. Provisions shall be included in contracts to ensure data is transferred to the KCC and purged from the systems of the awarded Bidder and all subcontractors at the end of the engagement and/or specified retention period.
- 4.4.11. Program-Level Management, Tracking and Status Reporting to the Kansas Energy Office. The awarded Bidder shall develop a package of regular reporting and update meetings to inform the Kansas Energy Office on the status of the Rebate Programs. These procedures and reports shall be documented and agreed upon at the initiation of the engagement.
- 4.4.12. Establish and Oversee Call Center. The awarded Bidder shall ensure call centers are established to maximize efficiency, minimize costs, and deliver customer support that drives the Rebate Programs participation. The awarded Bidder shall track each contact, phone, email, and corresponding document according to the data retention and privacy plan that the Bidder develops with the Kansas Energy Office during the engagement, and updated as needed. Additionally, the awarded Bidder shall report the call center metrics and escalate customer or stakeholder complaints that require escalation to the Kansas Energy Office, flagged and reported accordingly.

#### **4.5 Required Response Content and Order**

The RFP response must contain all of the following information in the order specified below and labeled accordingly with dividing pages:

1. Cover Letter
2. Table of Contents
3. Executive Summary
4. Transmittal Letter
5. Bidder Information
6. Qualifications

7. Experience
8. Scope of Work Deliverable Responses (Section 4.3)
9. Expectations and Responsibilities Responses (Section 4.4)
10. References
11. Bidder Contracts
12. Procurement Card (P-Card)
13. Exceptions

In addition to the content provided above, the Bidder shall provide the following completed attachments to the RFP response as described below:

- Any forms/attachments required in sections before this one and other attachments to the RFP, such as:
  - Signature Sheet.
  - Tax Clearance Certificate.
  - Immigration Reform and Control Certification.
  - Sexual Harassment Policy.
  - Certification of Company Not Currently Engage in a Boycott of Goods or Services from Israel.
  - Completed and signed Event Details Document.
  - Any Amendments or Supplemental Forms Provided (if provided).

#### **4.5.9 Cover Letter**

Bidder shall include all the following in the cover letter:

- Identification of the Bidder, including business name and website.
- Name, title, address, telephone number, and email address of the person authorized to act on behalf of the Bidder.
- A statement that the proposal shall remain valid for 120 days from the deadline for submission of the proposal.
- Signature of a person authorized to bind the offering firm to the terms of the proposal.

#### **4.5.10 Table of Contents**

Bidder shall insert a complete table of contents for material included in the proposal, including page numbers, sections, and subsections.

#### **4.5.11 Executive Summary**

Bidder shall provide a brief executive summary of the Bidder's approach to the design, development, and implementation of the Rebates Programs, including at least all the following:

- Summary of Bidder's experience
- Overall approach to the design, development and implementation of Rebates Program
- How their approach best fits the needs of Kansans

#### **4.5.12 Transmittal Letter**

Bidder shall include a Transmittal Letter as defined and described in Section 2.3 (Transmittal Letter) of this RFP.

#### **4.5.13 Bidder Information**

Bidder shall include bidder information as defined and described in Section 2.4 (Bidder Information) of this RFP. Additionally, the Bidder will be responsible for providing all staff people required to design, develop, and implement the Rebates Program, and must possess the relevant background and experience to undertake this effort, as well as sufficient financial stability.

#### **4.5.14 Qualifications**

Bidder shall include their qualifications as defined and described in Section 2.5 (Qualifications) of this RFP. Additionally, the Bidder shall provide a description of the Bidder's qualifications and experience providing the requested or similar services as outlined in Section 4.3 (Scope of Work). The Bidder also must state that it has qualified and sufficient personnel to meet the deadlines and requirements of DOE for the Rebates Programs. The Bidder must provide resumes for all personnel expected to work on the Rebates Programs.

#### **4.5.15 Experience**

Bidder shall include their experience as defined and described in Section 2.6 (Experience) of this RFP. Additionally, the Bidder must include a description of indicating that it has a minimum of two (2) years continuous active participation in a similar program to the Rebates Program. In particular, the Bidder shall include details of experience relevant to the Rebates Program and a list of current or recent related programs.

#### **4.5.16 References**

Bidder shall include their references as defined and described in Section 2.9 (References) of this RFP.

#### **4.5.17 Bidder Contracts**

Bidder shall include their contracts as defined and described in Section 2.10 (Bidder Contracts) of this RFP. If the Bidder has provided this information as an attachment, please note that and the file name here rather than repeating the content.

#### **4.5.18 Procurement Card (P-Card)**

Bidder shall include their response as described in Section 2.12 (Procurement Card (P-Card)) of this RFP. If the information has been provided in the Event Details document, please note that here rather than repeating the content.

#### **4.5.19 Exceptions**

As described in Section 1.18 (Exceptions) of this RFP, by submission of a response, the Bidder acknowledges and accepts all terms and conditions of the RFP unless clearly avowed and wholly documented.

#### **4.6 Fee Structure**

For purposes of this RFP, provide pricing for services and deliverables. This should be a fixed fee with a not to exceed pricing model for all services.

#### **4.7 Proposal Evaluation**

Submitted responses will be evaluated in the following areas by the Kansas Energy Office staff:

1. Organizational Expertise and Experience
  - a. Bidder's ability to provide adequate staff with necessary skills to complete the Rebate Programs
  - b. Bidder's ability to provide experienced key staff members that have necessary qualifications, education, and training.
  - c. Bidder's capacity to implement the Rebate Programs.
2. Response to the Scope of Work
  - a. Bidder has clearly explained how it will accomplish the Scope of Work by providing a description of how all the requirements specific to the Scope of Work will be implemented.
  - b. Bidder has the ability to meet the expectations and responsibilities
  - c. Bidder has included details on designing the Rebate Programs
  - d. Bidder has included details on developing the Rebate Programs
  - e. Bidder has included details on implementing the Rebate Programs
  - f. Bidder has included details on collaboration with Kansas Energy Office Staff
  - g. Bidder has included details on compliance and reporting requirements
  - h. Bidder has included details on data and security requirements.
  - i. Bidder has included details on home assessments, quality assurance, and consumer protection.
  - j. Bidder has provided a timeline, proposed milestones, and clear budget breakdown
  - k. Bidder has shown it has researched Kansas markets and tailored their response to meet the needs of Kansas.
3. Thoroughness of the response/proposal
4. Flexibility of the Bidder and willingness to adapt to DOE guideline changes and input from the Kansas Energy Office staff.

#### **4.8 Term of Contract:**

This contract is contingent upon DOE approval and funding. The term of this contract is from the award date until June 30, 2029.



## EVT0009651 – Amendment One

### KS IRA Rebate Programs-Design, Development, and Implementation

#### Questions and Answers

**Q1:** Would the State of Kansas allow for the submission of a Redacted Copy of a Respondent's response redacting portions of the proposal that are considered confidential?

**A1:** **No**

**Q2:** Would the State of Kansas allow the inclusion of Appendices, and for resumes (referenced in Section 6 - Qualifications) to be included as an Appendix?

**A2:** **Yes**

**Q3:** Would the State find it to be a conflict of interest to bid on this opportunity if a bidder also holds a contract with the DOE that puts them in a position to provide feedback on DOE's approval of the State's selection of a contractor under this opportunity, and or provides consulting services that may include review and approval of the State's (or another State's) application for funding to the DOE prepared with the support of a competing vendor?

**A3:** **Yes**

**Q4:** The Event Details document outlines the Bidder Preference Program for Disabled Veteran Owned, State Use Purchases, and Certified Business. Can these preferences be met through a subcontractor or must the preference requirements be met by the prime contractor? If preference can be achieved through subcontractors, can KCC provide additional details on the scoring preference?

**A4:** **The prime contractor has to be part of the "Bidder Preference Program"**

**Q5:** Section 2.4 (Page 15) of the RFP request "the number of personnel, full and part time, assigned to this project by function and job title, and resources assigned to this project and the extent they are dedicated to other matters". The composition of the team will evolve over the life of the programs given the need for different skill sets for different task and phases of the program. Therefore, may a Bidder provide the key leadership for the program planning and design and a proposed organizational chart to demonstrate the various roles rather than exact personnel?

**A5:** **Yes.**

**Q6:** Section 2.9 (Page 16) request "Unit pricing: Each item required by the bid must be individually priced (i.e., per single unit) and be able to be ordered individually", and Section 4.6 and Section 5 Cost Sheet request "a flat fee for administration with a not to exceed pricing model for all services". Can the KCC confirm the Bidder should price based on a flat fee as structured in Section 5?

**A6:** **As stated in 4.6 this should be flat fee, however that flat fee has to be based on deliverables and the vendor should be able to support how they calculated the flat fee. It should be listed out exactly what the bidder plans to provide and the cost of each item.**

- Q7:** Section 4.3.5.1 (Page 29) states "...Bidder must include a budget breakdown of early administrative work and future implementation work", and Section 4.7 Proposal Evaluation states "Bidder has provided a timeline, proposed milestones, and a clear budget breakdown." The Transmittal Letter in Section 2.3 (Page 15) request that "no cost or pricing information has been included in the transmittal letter or the Technical Proposal". Can the KCC confirm that the Bidder should only include the budget breakdown within the Cost Proposal and not within Section 4.3.5.1?
- A7:** **Yes, the Bidder should only include the budget breakdown within the Cost Proposal.**
- Q8:** Section 4.3.8 (Page 31) request "Bidder should submit a plan outlining how they plan to ensure compliance with the DOE guidelines, Davis-Bacon Act, Build America, Buy America, and any future legislative or regulatory compliance." Our current understanding from the DOE FAQs is that Davis-Bacon Act and Build America, Buy America do not apply to the Rebate Programs. Does the KCC intend to include these compliance requirements within the State of Kansas' DOE application?
- A8:** **No we do not intend to include the compliance requirements. The application will adhere to DOE requirements.**
- Q9:** Section 4.4.2 Subcontractor Management & Section 4.4.9 Training (including subcontractors) (Page 33) - Does the KCC intend for the Bidder to hold contracts directly with qualified contractors that will be performing the work for the qualified projects within applicants' homes? If yes, do these two sections include both subcontractors for the planning and implementation work as well as the eligible rebate project work?
- A9:** **The Bidder is not required to hold contracts directly with qualified contractors, however, the bidder should have a connection with qualified contractors that will be performing the work for the qualified projects within applicants' homes. It will be the bidder's responsibility to ensure the contractors are qualified to perform the work under the DOE requirements and is compliant with DOE requirements.**
- Q10:** Section 5 Cost Sheet: Could the KCC clarify what should be included in "Resource Cost (Specify per resource)"?
- A10:** **Resource Cost includes but not limited to: online education and outreach resources for residents, physical copies of education and outreach materials, cost of call centers (staffing, etc.), marketing costs, public input session costs, website design costs to track funding, etc.**
- Q11:** Section 5 Cost Sheet: The Cost Sheet request a price for Home Assessments. Our current understanding from the DOE is that portions of the Home Assessment costs can be included as Rebate Funds rather than Administrative Cost. Does the KCC intend to include Home Assessments in the Administrative Budget?
- A11:** **It is KCC's understanding that the Home Assessments are included in the Administrative Budget. However, Kansas will not deviate from the DOE requirements and guidance, and will reevaluate after future discussions with DOE.**

**Q12:** Would the KCC allow vendors to submit a 'Review Copy' of the proposal with all of the information, including proprietary information, visible? This would allow the reviewers to read one document rather than having to utilize multiple documents to review a single proposal. This change would result in the submission of one additional document from a vendor, resulting in three documents:

- the main document with proprietary information removed to be used for public information requests (per RFP pg 13, 1.17)
- the proprietary information separated from the main document (per RFP pg 13, 1.17)
- a single document with all of the information included to be used solely by the State and their selected reviewers to facilitate the reviewing and scoring of the proposals

**A12:** **Yes**

**Q13:** Will the Commission please provide a Sample Contract for Respondents consideration in response to EVT0009651- Kansas IRA Rebate Programs: HOME and HEEHR-Design, Develop, and Implementation

**A13:** **We do not have a sample contract at this time to provide.**

**Q14:** Will the program be subject to cost-effectiveness testing? If so, could you provide details on the cost-effectiveness requirements that are applicable to this RFP?

**A14:** **No.**

**Q15:** For utility data access, are there any existing guidelines or policies for third-party access and/or aggregated data access for buildings with multiple units?

**A15:** **We will be reliant on the guidance and requirements provided by DOE and the experience of the Bidder.**

**Q16:** What percentage of Kansas utilities/customers have green button or other electronic formats of energy data available to third-party providers? If green button data is not available, please specify the formats available for accessing utility bills for measured savings (e.g. a different electronic format, PDF copies of bills, etc.).

**A16:** **It is unknown the percentage of Kansas utilities/customers that have green button or other electric formats of energy data available. Much of rural Kansas is served by co-ops and do not have green button data. It will be the responsibility of the awarded Bidder to communicate with the utilities on ways to obtain energy data from them.**

**Q17:** Are there any restrictions on using administrative funding for compensating community-based organizations, tribal governments, and other stakeholders for their involvement in the stakeholder engagement process? For example, are gift cards allowed to be used or does a certain method of payment have to be used?

**A17:** **No funding will be used for compensating community-based organizations, or other stakeholders for their involvement in the stakeholder engagement process. Engagement of 3<sup>rd</sup> parties will be subject to KCC approval.**

- Q18:** Can the State of Kansas confirm if they plan to make an award to a single vendor for all line items?
- A18:** **The award will be to a single vendor to handle all line items for both grants. The bidder must be willing to do all line items to be considered.**
- Q19:** Please confirm that the RFP response should follow the order specified in 4.5 of the bid documents.
- A19:** **Please follow the order specified in 4.5 of the bid documents, as this is the sequence the agency will review.**
- Q20:** Section 5 Cost Sheet list the various Vendor Tasks to be Completed During Life of Contract. Does the KCC intend for the bidder to price each line item separately? Or does the KCC intend for the bidder to only provide the Flat Fee for All Early Administrative Services Concerning HOMES Rebate Grant, Flat Fee Amount for Remainder of Services (Implementation, Reporting, Distributions, etc.), and Total Cost?
- A20:** **The Bidder should outline the breakdown of the flat fee. It is important that we can see exactly what each item/task costs for administering the programs.**