

REQUEST FOR PROPOSALS FOR PROVIDING AS-NEEDED SERVICES FOR THE IMPLEMENTATION OF THE HOME EFFICIENCY REBATES PROGRAM FOR (SECTION 50121) IN NEW MEXICO

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Clean Energy Program Manager/Procurement Manager**

January 13, 2025



Energy, Minerals and Natural Resources Department



**U.S. DEPARTMENT OF
ENERGY**

New Mexico Energy Conservation and Management Division

- This meeting will be recorded;
- this presentation will be published in our website; and
- if you'd like to notified about amendments for this RFP and upcoming RFPs, please enter your e-mail address in the chat.



Scope of Procurement

As-needed Services for the Implementation of the Home Efficiency Rebates (HER) Program (50121)

- May award multiple contracts resulting from this RFP – One for single-family implementer and one for multifamily implementer.
- Contract duration: Not to exceed 4 years
- Proposal Contents – Please include ALL items. Failure to follow guidelines **will** disqualify proposal on grounds of non-responsiveness
- Work will be assigned on an as-needed basis, by means of task order

Proposals AND references due electronically:

January 23, 2025, at 3:00 P.M. MST

Energy Conservation and Management Division

Procurement Manager: Yeny Maestas

Yeny.Maestas@emnrd.nm.gov

505-795-2381

Proposals to be submitted in PDF format via e-mail.

Sequence of Events

- Last day to submit questions is January 16, 2025, at 3:00 P.M. MST
- Q&A will be posted on our website ASAP below:
- <https://www.emnrd.nm.gov/ecmd/about-us/requests-for-proposals-applications/>
- Proposals Due: **January 23, 2025, at 3:00 P.M. MST**

Proposal Evaluation Assigned Points

No.	Evaluation Factor	Points Available
1.	<p>Project Approach and Technical Capabilities</p> <p>Points will be awarded on the Offeror's detailed, effective, creative and efficient implementation approach of the HER Program's SOW, especially as it relates to keeping administrative costs as low as possible (lower administration costs = more rebates for low-income New Mexicans). The Offeror must demonstrate understanding of the purpose and scope of the program, including the approach for successful and timely launch.</p>	40
2.	<p>Record of Past Performance</p> <p>This criterion considers the Offeror's past experience with similar DOE programs (for example: solar rebates program), government agencies, or private industry with respect to such factors as control of costs, quality of work, training approaches, braiding and stacking of programs, and ability to meet schedules.</p>	30
3.	<p>Capacity and Capability</p> <p>Points will be awarded on the Offeror's ability to achieve the SOW, good financial standing, indicate key personnel, specific roles and experience, Professional Seal/Certificate Number; identify lines of authority and limits of capacity of each member of the team, delineate roles of subconsultants, if any.</p>	20
4.	<p>Proximity and Familiarity</p> <p>This criterion considers Offeror's proximity and familiarity with the southwestern United States, and the awarded number of points will be determined by the Offeror's and any subconsultant's expertise and experience on projects in the southwestern part of the U.S. as they relate to the SOW.</p>	7
5.	<p>References</p> <p>Points will be awarded based upon an evaluation of the responses to a series of questions that will be asked of the references concerning the quality of the Offeror's services, the timeliness of services, responsiveness to problems and complaints and the level of satisfaction with the Offeror(s) overall performance (See Attachment 3 and 4, Reference Questionnaire).</p>	3

Proposal Contents:

- Letter of Transmittal
- Table of Contents
- Proposal Category Form
- Deliverables-based budget
- Statement of financial stability or equivalent
- Past project experience
- Approach to successful and effective HER Program implementation
- Campaign Contribution Disclosure Form
- Statement of Assurances Form

Please, do not forget to include the following items in your proposals, or you will be deemed non-responsive:

- Letter of Transmittal that includes a statement of acknowledgment for all, if any, Amendments; SAM.gov information.
- A filled-out 2024 W-9 with wet signature or DocuSign.
- Category or categories for which you are submitting a proposal.
- Campaign Contribution Disclosure Form.
- Statement of Assurances Form.

Procurement Manager contact information:

Yeny Maestas

Program Manager

Telephone Number: 505-795-2381

E-mail: Yeny.Maestas@emnrd.nm.gov



HER Program Overview

**The State of New Mexico
aims to have the program
available to the public by
Second Quarter of 2025.**

IRA HER (50121) Program Overview

- Section 50121 of the Inflation Reduction Act (IRA) 2022
- Main Goals: to save households money, to grow American manufacturing and clean energy jobs and fight climate injustice.
- NM – \$40+M allocated for home energy rebates
- 20% cap for administration costs, including State costs.



IRA HER (50121) Program Overview

- New Mexico is solely focusing on 80% Area Median Income Households or less, EJ40 communities;
- 75% rebates will go to single-family homes and 25% rebates will go to multifamily residential buildings;
- program is retroactive to August 16, 2022;
- only modeled home efficiency rebates;
- rebates for completed projects may include:
 - a) heating and cooling systems
 - b) building envelope (air sealing, insulation, windows, doors)
 - c) water heating systems.



IRA HER (50121) Program Overview

- Implementer will work with our technology consultant to process applications and rebates (www.cleanenergy.nm.gov);
- implementer will be responsible for processing rebates from contractors within 4 weeks of rebate application;
- implementer will be responsible for “fronting” the rebates to contractors and submitting payment to the State for reimbursement until the State procures a separate consultant to “front” the rebates;
- Implementer will be responsible for processing applications, customer service via e-mail or by maintaining a call center.



SCOPE OF WORK

Single-Family Homes Implementation

HER Program General Responsibilities

- All work will be assigned via task order;
- All media inquiries shall be referred to ECMD;
- Must not exceed 20% of funds for planning, administration, and technical assistance. This 20% includes the State's costs, too. The remaining funds are for rebates for envelope improvements as outlined by the DOE program requirements;
- Program only using modeled savings for rebates.

HER Program Planning, Design, Pre-launch

- Design an implementation strategy and timeline, that considers technical and financial analyses;
- assist ECMD with all the required plans prior to launch;
- develop state-wide community outreach, gathers data resulting from outreach and integrate feedback into the design of the program; and
- ongoing contractor training.

HER Program Implementation Services

- Implement plan design after ECMD review and approval;
- use relevant tools developed by DOE, NREL, PNNL or as recommended by ECMD;
- verify eligibility: income (less than 80% AMI) or means-tested benefit;
- verify for landlord permission for projects;
- conduct utility bill risk assessments to check for rising utility bills;
- conduct modeled savings estimates using BPI-2400 Standard to calculate rebates;

HER Program Implementation Services

- Issue and track rebates, including retroactive rebates;
- data gathering and analysis;
- develop a consumer protection plan, provide quality control, and on-site inspections;
- ensure Energy Star equipment is installed correctly;
- maintain accurate invoices;
- take and retain geotagged post-installation photos;
- identify other program partners for “stacking and braiding”;

Training of Contractors for HER Program

- Partner with underrepresented business;
- develop training for contractors and offer certifications for this program;
- maintain a list of qualified contractors and manage contractors on that list;
- provide technical assistance;
- provide complete or partial payment to contractors in a timely manner until ECAM has a consultant who can “front” payments;
- take and retain geotagged post-installation photos; and
- identify other program partners for “stacking and braiding”;

Monitoring, Post-Implementation And Customer Service

- Conduct assessments to achieve continuous improvement;
- coordinate with utilities to obtain consumption data (if necessary);
- provide technical assistance;
- conduct customer satisfaction surveys ;
- implement resolution procedure for disputes; and
- ensure owners of units occupied by renters comply with DOE requirements;

Collaboration with Other Entities and Miscellaneous

- Collaborate with ECMD's existing information technology consultant, Real Time Solutions;
- collaborate with energy coaches (coming soon);
- coordinate with other NM state agencies to facilitate income verification or participation in means-tested benefits, outreach, contractor training, etc.;
- coordinate with EMNRD on a one-stop shop clearinghouse website and customer call center, jointly funded by several EMNRD programs
- provide ongoing administrative support, assist with reporting to DOE, provide regular project updates as requested by ECMD; and
- follow best practices for continuous improvement and provide documentation of such to ECMD.

Multifamily Buildings Implementation

Multifamily Residential Buildings Implementation

- All items apply as indicated before in General Responsibilities, Planning and Design, Implementation, Contractor Training and Post-implementation Monitoring;
- determine if a multifamily building qualifies as a low-income building (50% of households with incomes less than 80% AMI);
- obtain landlord/owner permission for a project; and
- calculate rebates according energy savings + number of dwellings.

Subcontracting

Because federal funds are being used for this procurement:

- A. Contractor shall comply with 2 C.F.R. 200.318 through 200.326 for procurement of services or property.
 - eliminates unfair competitive advantage
 - the non-Federal entity (offeror) must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.
- B. Contractor may be required to provide ECMD with evidence of competitive procurement for any subcontract, including records of advertisement of bid, proposals received, and methods to select each subcontractor.
- C. Any subcontract agreement shall include all provisions necessary to allow Contractor to meet its obligations and requirements.

If you haven't already, don't forget to
register for the Unique Entity ID with
SAM.gov

This is a **STRICT** requirement.



Thank you!



QUESTIONS? COMMENTS?

Verbal responses to questions will not be binding. We would request all questions also be submitted in writing to the Procurement Manager by e-mail. Responses to questions will be provided in a forthcoming Amendment posted on the EMNRD/ECMD website (DON'T FORGET TO ACKNOWLEDGE!). Questions must be submitted no later than 3:00 PM MST on **January 16, 2025**, to the Procurement Manager at the e-mail address listed below. Questions with the corresponding Answers will be posted ASAP pending legal review.

All questions regarding this RFP MUST be submitted in writing to:

Yeny.Maestas@emnrd.nm.gov