# Attachment A

**AGENCY SOLICITATIONS**
**SOLICITATION NO. EV00000921**

This solicitation is a contract document and is a request for proposal in connection with the contract awarded on behalf of The Oklahoma Department of Commerce (ODOC) by the Office of Management and Enterprise Services (OMES) as more particularly described below. Any defined term used herein but not defined herein shall have the meaning ascribed in the General Terms or other contract document.

## I. PURPOSE

The Office of Management and Enterprise Services (OMES) Central Purchasing division is seeking responses on behalf of The Oklahoma Department of Commerce (ODOC) from potential suppliers to provide a contract for the purchase of contractor support for planning, application and implementation tasks required to implement, The U.S. Department of Energy (DOE). HOMES (Home Owner Managing Energy Savings-Section 50121) and HEEHR (High-Efficiency Electric Home Rebates-50122).

A contract resulting from this solicitation may be designated for use as a statewide contract. *See* 74 O.S. § 85.5(G)(3).

The contract is awarded on behalf of The Oklahoma Department of Commerce (ODOC) will be the awarded applicant of these grant funds as part of the Oklahoma State Energy Office (OK-SEO). The programs will deliver rebates to families determined eligible. Oklahoma is primarily considering low-income families but may consider slightly higher-income families with stakeholder and contractor input. The US Department of Energy (DOE) anticipates that the Home Energy Rebates will support the growth of the clean energy economy by broadening access to and increasing demand for home energy upgrades for all households.

Table 1 provides Oklahoma's anticipated formula award amounts:
*Table 1: Oklahoma's Anticipated Formula Award Amounts*

| Program | Award Amount |
|---|---|
| HOMES (Home Owner Managing Energy Savings-50121) | $64,634,146.00 |
| HEEHR (High-Efficiency Electric Home Rebates-50122) | $64,388,040.00 |

The overall outcome of this solicitation is to procure a contractor or team of contractors with qualifications and experience sufficient to deliver the following services:

a. Develop program design and strategy
b. Revise submitted application (if needed) and develop implementation blueprints (as appropriate)
c. Implement programs consistent with implementation blueprints
d. Develop and implement data and software/application tools
e. Monitor program progress, use tracking systems to prepare regular reports
f. Support program evaluation as needed.

Successful bidders will be expected to work closely with The Oklahoma Department of Commerce (ODOC) and stakeholders to develop two new high-quality rebate programs to assist low-income families throughout the state of Oklahoma in compliance with the most current Federal application guidance. Then, at a later date, implement

the program once approved by The U.S. Department of Energy (DOE). All solicitation responses must be in compliance with the requirements laid out in this solicitation and with all The U.S. Department of Energy (DOE) requirements.

SCEP Home Energy Rebates Administrative and Legal Requirements Document (ALRD)
SCEP Home Energy Rebates SCEP Home Energy Rebates Administrative and Legal Requirements Document (ALRD) Checklist
SCEP Home Energy Rebates Program Requirements and Application Instructions
SCEP Home Energy Rebates: Data and Tools Requirement Guide
SCEP Home Energy Rebates: Budget Justification Workbook Template
SCEP Home Energy Rebates: Budget Allocation Calculator
SCEP Home Energy Rebates State Allocations
SCEP Home Energy Rebates Pre-Award Information Sheet
Home Energy Rebates Program-notice-26-1
Home Energy Rebates Program-notice-26-2

The Oklahoma Department of Commerce (ODOC) may select a single contractor or award to two different contractors (who may then choose to engage subcontractors of their own) with the qualifications to deliver the three core programs described below (Program Design, Strategy, and Application Support), for both Home Efficiency Rebates for Home Owner Managing Energy Savings Rebates (HOMES) and High-Efficiency Electric Home Rebates (HEEHR). However, The Oklahoma Department of Commerce (ODOC) also reserves the right to select different contractors for each program, if a single contractor does not submit a suitable plan that meets The U.S. Department of Energy (DOE) requirements. Therefore, contractors who can only deliver on some outcomes or perform some of the tasks described (but not all) are also encouraged to bid on this solicitation. The Oklahoma Department of Commerce (ODOC) acknowledges that specific subcontractors may not be identified at the time of solicitation. In this scenario, bidders should provide a procurement plan instead. Subcontractors must be properly procured per Federal/State requirements and preapproved by The Oklahoma Department of Commerce (ODOC). The Oklahoma Department of Commerce (ODOC) reserves the right to award this solicitation to multiple bidders, at its discretion, to complete all required program initiatives. Contractor(s) will lead the overall program management and report to The Oklahoma Department of Commerce (ODOC)'s Deputy Division Director of Community Development/Energy Team.
The Contract is awarded on behalf of the Oklahoma Department of Commerce (ODOC) to assist with the management of programs in accordance with the guidance of any program administration by The Oklahoma Department of Commerce (ODOC), for the entire State of Oklahoma as further determined necessary through engagement with The Oklahoma Department of Commerce (ODOC) and its stakeholders.

**1. Contract Term and Renewal Options**

The initial Contract term, which begins on the effective date of the Contract, is one (1) year and there are four (4) one-year options to renew the Contract or through September 30, 2031.

**2. Contract Specifications**

**2.1**. Certain Contract requirements and terms are attached hereto as Exhibit 1 and incorporated herein.

## 3. Solicitation Criterion

**3.1** To keep the evaluation process fair and unbiased, all bid responses shall be blind. A blind bid submission means that the identity of the Bidder shall not be revealed or recognizable in any portion of the bid response, except those identified in the bidder instructions. The Bidder's name, logo, branding, or any other identifying information must not appear in the body of the bid response. Identifying information is only permitted in sections designated explicitly for administrative or contact details, as described in the bidder instructions. Those parts of the bid response which identify the Bidder will be separated from the evaluation materials prior to review by the evaluation team. Failure to submit a blind bid response may result in disqualification of the Bidder.

**3.2** The Bid will be evaluated **blindly using a best value criterion**, based on the following:

**3.2.1** Mandatory Deliverables / Experience- Exhibit 1
**3.2.2** Timeline- Exhibit 2
**3.2.3** Program Design/Technical Design Methodology- Exhibit 3
**3.2.4** Data & Tools- Exhibit 4
**3.2.5** Program Evaluation, Monitoring and Reporting Plan- Exhibit 5
**3.2.6** References- Exhibit 7
**3.2.7** Preference Points: additional preference points may be given for each of the Proposal from a Single Contractor with Subcontractors, Experience with Energy Rebate Programs, Compliance with Federal and State Procurement Policies, Experience with Oklahoma Rebate Programs, Experience with Federal Grants, Experience with Program Design from Scratch, Program Implementation, Timeline Feasibility and Completeness, References: Past client endorsements (that were not provided to us as references) provide evidence of reliability, competence, and successful outcomes, Stakeholder Engagement.
**3.2.8** Price (two separate budgets, one for HEEHR (High-Efficiency Electric Home Rebates) and one for HOMES (Home Owner Managing Energy Savings)
**3.2.9** Ability to supply products/services
**3.2.10** Product Acceptability

## 4. Scope and description

**4.1.** The Bid Response must reflect for each requirement on Exhibit 1 whether the requirement is met by an out-of-the-box solution or whether the requirement necessitates customization to the Bidder's proposed solution.

**4.2** The Bid Response shall show the ability of the Bidder to meet or exceed the following mandatory specifications listed in Exhibit 1.

**4.3** The Timeline requirement for this solicitation shall be proposed using Exhibit 2.

**4.4** The Program and Technical Design requirement for this solicitation shall be proposed using Exhibit 3.

**4.5** The Data and Tools requirement for this solicitation shall be proposed using Exhibit 4

**4.6** The Program Evaluation and Reporting Plan requirements for this solicitation shall be proposed using Exhibit 5.

**Note:** DOE will only release funding to ODOC as the following milestones are

met:

a. 25% of funds – Once ODOC's application is negotiated and approved

b. 30% of funds – Approved program launch and approved state implementation blueprint

c. 25% of funds – Approved market transformation plan

d. 20% of funds – Approved independent privacy and security review

Approved Quality Assurance plan

Completed review of incentive implementation

**5. Pricing**

**5.1** Pricing associated with the submission shall be a proposed budget. The budget does not have to be detailed at this time, as The Oklahoma Department of Commerce (ODOC) is aware many specific details will have to be discussed. However, there should be a breakdown of program design and implementation (ongoing) to administrate the program over the Federal allowed time. The Oklahoma Department of Commerce (ODOC) should be able to determine, from the budget form, how much will be spent on administrative contractor fees vs. which funds will be allocated to direct rebates. The Oklahoma Department of Commerce (ODOC) must also be able to estimate how much total administrative funds will be spent annually. For example, will the startup year be higher in costs? Oklahoma's allocation is in the Table below. The Oklahoma Department of Commerce (ODOC) will be keeping 2.5% in administrative funds. All state final allocations can be found here. See Table 1 at the beginning of the solicitation as well. The program funds will be made available by The U.S. Department of Energy (DOE), according to the regulations, until September 30, 2031.

**5.2** Funding of the project is contingent upon the following:

- Availability of Federal funds appropriated by Congress and award by The Department of Energy (DOE).
- No performance holds placed on The Oklahoma Department of Commerce (ODOC)'s contract by The U.S. Department of Energy (DOE).
- No discontinued funding due to insufficient progress, change in strategic direction, or lack of funding as defined by The U.S. Department of Energy (DOE).

**5.3** Value-added products and/or services within scope of the Acquisition may be included in Exhibit 1

**5.4** The response to pricing shall be proposed using a line-item budget.

6. **Executive Summary and company information.** Located in Exhibit 6: shall be proposed using Exhibit 6 – Company Information.
7. **All Technical responses.** Located in Exhibit 1.
8. **The response to pricing** shall be proposed -one for HEEHR (High-Efficiency Electric Home Rebates) and one for HOMES (Home Owner Managing Energy Savings).
9. **Business References** shall be proposed using Exhibit 7 – References.
10. **Third-party vendor information** shall be proposed using Exhibit 8 - Third Party Vendor Information.