



GOBIERNO DE PUERTO RICO
DEPARTAMENTO DE DESARROLLO ECONÓMICO Y COMERCIO

REQUEST FOR PROPOSALS (RFP)

FOR

PROGRAM MANAGEMENT SERVICES

UNDER THE

ENERGY POLICY PROGRAM

RFP-DDEC-EPP-2023-003

**PUERTO RICO'S DEPARTMENT OF ECONOMIC
DEVELOPMENT AND COMMERCE**

December 11, 2023
RFP Issued

Due Date: January 15, 2024, at 3:00 p.m.
Proposal

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1. DEFINITIONS/ACRONYMS

The following terms shall have the meanings indicated below, shall apply to both their singular and plural forms:

- **“Addendum”** shall mean the written documents issued by the DDEC to revise, amend or otherwise, modify this RFP.
- **“Consultant”** refers to the experienced personnel appointed by the Respondent that can provide consulting services in the administration of the awarded contract.
- **“DEDC”** means the Department of Economic Development and Commerce, which is the agency that serves as the grant recipient for State Energy Program funds allocated through the U. S. Department of Energy.
- **“Evaluation Committee”** means the qualified technical review Committee appointed by the DEDC to evaluate the Proposals submitted by Respondents.
- **“Key Staff”** refers to the employees appointed by the Respondent to deploy the proposed solution.
- **“EPP”** refers to the Public Energy Policy Program made part of the Department of Economic Development and Commerce in accordance with Act No. 141 of July 11, 2018, also known as Execution Act of the Reorganization Plan of the Department of Economic Development and Commerce of 2018 (Act 141-2018).
- **“Proposal”** shall mean each Respondent's submittal in response to this RFP. Concerning the evaluation of Proposals and selection of a successful proposer, the "proposal" shall include any best and final offers requested by the DEDC and submitted by a Respondent.
- **“Proposal's Due Date”** means the date and time outlined in this RFP for submission of the Proposal. Date and time may be amended from time to time by Addendum.
- **“Respondent”** means the firms that respond to this RFP.
- **“RFP”** means this Request for Proposals, as amended, revised, or modified, issued by the DEDC to procure the services herein described.
- **“SEP”** refers to the State Energy Program whose funds, assigned by the U.S. Department of Energy, are managed by the EPP to promote the efficient use of energy, and reduce the consumption and demand for energy, through the development and implementation of programs that support the Puerto Rico Public Energy Policy.
- **“Successful Proposer or Selected Proposer”** means the Respondent selected to provide services solicited through this RFP.
- **“WAP”** refers to the Weatherization Assistance Program whose funds, assigned by the U.S. Department of Energy, are managed by the EPP to reduce residential energy costs while ensuring the health and well-being of eligible families, prioritizing homes with children, the elderly, and people with disabilities, among other things.

2. INTRODUCTION

2.1 Description of the Agency/Program Issuing the Request for Proposals

The DEDC is a public agency and instrumentality of the Government of Puerto Rico, duly organized and existing according to Reorganization Plan No. 4 of June 22, 1994, as amended. It is responsible for implementing and supervising the execution of Puerto Rico's public policy on economic development. Among its programs is the Energy Policy Program (EPP) which was made part of the DEDC through Act No. 141 of July 11, 2018, also known as Execution Act of the Reorganization Plan of the Department of Economic Development and Commerce of 2018 (Act 141-2018). Among other things, the EPP is mainly responsible for implementing and supervising the execution of Puerto Rico's public policy on economic development. In addition, it is the designated to administer the funds assigned to Puerto Rico from several DOE programs.

The EPP administers several federally funded programs assigned by the Department of Energy. Among them is the State Energy Program (SEP) and the Weatherization Assistance Program (WAP) whose funds are granted in accordance with the Energy Policy and Conservation Act, as amended (42 U.S.C 6321 et. seq. and 42 U.S.C 6861 et. seq, respectively).

The SEPs mission is to promote the efficient use of energy and reduce the consumption and demand for energy, through the development and implementation of energy efficiency projects. As for the WAP, for which Puerto Rico has participated since 2009, it assists low-income families who lack the resources to invest in energy efficiency. The EPP also manages other federal funds delegated by other government agencies to implement energy efficiency initiatives.

Additionally, the EPP manages other federal funds assigned in accordance with federal legislation to implement energy related initiatives in Puerto Rico.

2.2 Overview and Purpose

The Department of Economic Development and Commerce seeks proposals to select a firm to provide Program Management services to the EPP for a one-year contract and renewable subject to availability of funds.

The proponents must be able to provide management and administration services that will support EPP in achieving the different objectives they have planned for the federal funds to be received.

This procurement action may result in one or more contract awards, based on areas of expertise and upon funds available through the different federal funding streams detailed in the Scope of Work section of this RFP.

Eligible Respondents

The applicants must be able to demonstrate previous experience and the capacity and commitment to develop services for a diversity of situations and requirements of the DEDC's EPP. The work requires understanding of the federal objectives for the different federal funds

to be received, be able to integrate the perspectives of the different stakeholders and have the capacity to implement various components, when required, and within the time frame given by the EPP Director. Previous experience of the Program Manager and its key personnel should be in the management or administration in Puerto Rico of energy related federal funds or programs, like the WAP, SEP or ARRA.

3. STATEMENT OF PURPOSE

The U. S. Department of Energy (DOE) Weatherization Assistance Program (WAP) issued a \$25 million Funding Opportunity Announcement (FOA) entitled “BIL WAP Enhancement & Innovation” with a maximum award amount of \$2 million, in support of section 40551 of the Infrastructure Investment and Jobs Act (IIJA) of 2021, also known as the Bipartisan Infrastructure Law (BIL). With these funds the DOE seeks to expand the impact of existing residential weatherization programs by utilizing leveraged resources and enhanced community partnerships to perform deep energy retrofits of low- income residential buildings and empower local community representation within the energy workforce. To achieve this the funds should be used to enable deep energy retrofits of low-income housing in three (3) topic areas: 1) Multifamily Housing; 2) Single family and Manufactured Housing; and 3) Workforce Development. It is expected that the EPP will receive \$38 million for the execution of the BIL WAP objectives.

Additionally, the Inflation Reduction Act (IRA) signed into law on August 16, 2022, included funding to support clean energy and address climate change, including rebate programs for home energy efficiency and electrification projects. These home energy rebates will help American households save money on energy bills, upgrade to clean energy equipment and improve energy efficiency, and reduce indoor and outdoor air pollution. Specifically, these rebates are the:

1. Home Efficiency Rebates, included in IRA section 50121, to provide single-family and multifamily households with discounts for efficiency upgrades that are predicted to save at least 20% of the home’s energy use and
2. Home Electrification and Appliance Rebates, included in IRA section 50122, to provide single-family and multifamily households with discounts for high efficiency home appliances and equipment.

It is expected that the EPP will receive \$42.5 million for the execution of the Home Efficiency Rebates objectives and \$42.7 million for Home Electrification and Appliance Rebates.

Also, within the IRA section 60103, EPA was authorized to implement the Greenhouse Gas Reduction Fund, to mobilize financing and private capital to combat the climate crisis and ensure American economic competitiveness. The Greenhouse Gas Reduction Fund is intended to deliver lower energy costs and economic revitalization to communities, particularly those that have historically been left behind. The Fund will be implemented via the following three (3) grant competitions: 1) National Clean Investment Fund, 2) Clean Communities Investment Accelerator and 3) Solar for All. In Puerto Rico the Office of Management and Budgeting

(OGP) sent a proposal to compete for the Solar for All grant and is pending official notification of award. If OGP is awarded the amount requested, it is anticipated to grant the EPP with \$54 million to execute the objectives of the grant.

The EPP expects to receive these funds soon and hence needs a Program manager to support the EPP Director in the execution each fund specific objectives and in the implementation of the BIL WAP.

4. BACKGROUND INFORMATION

The DEDC/EPP oversees the development and promulgation of the public energy policy of the Government of Puerto Rico, by virtue of Act No. 141 of July 11, 2018, also known as Execution Act of the Reorganization Plan of the Department of Economic Development and Commerce, of 2018. Among its multiple functions, it oversees administering and operating different federal programs, among them, the State Energy Program (SEP), the Home Weatherization Program (WAP), and the State Program of the Green Energy Fund, with the main purpose of promoting energy efficiency and introducing renewable energy to the Puerto Rico electricity grid. Pursuant to Law 17-2019, known as the Puerto Rico Public Energy Policy Act, the objective is to mitigate Puerto Rico's dependence on centralized fossil fuel plants and optimize the available energy resources that allow building resilience and, ultimately, facilitating that the island can obtain 100% of its energy from renewable sources by 2050.

5. SCOPE OF WORK

The EPP is seeking a consulting firm as Program Manager to all its federal funded programs and carry out all related tasks. The funds to award through a contract(s) are governed by the several federal funding streams mentioned before, local, state, and federal laws, regulations, and directives, and 2 CFR *Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards*. The selected professional services firm(s) must be knowledgeable of the allowable costs for all funding streams, to avoid the potential for disallowed costs.

The possible federal funding streams are the following:

	Enabling Legislation	Legislation Section	Working Title	Funding Available to Puerto Rico in million
1	Infrastructure Investment and Jobs Act	40551	Weatherization Assistance Program Enhancement & Innovation	\$38
2	Inflation Reduction Act	50121	HOPE for HOMES Act Program	\$42.5
3	Inflation Reduction Act	50122	High-Efficiency Electric Home Rebate Program	\$42.7

4	Inflation Reduction Act's	60103	Greenhouse Gas Reduction Fund (GGRF): Solar for All Grant	\$54*
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*The Puerto Rico Office of Management and Budgeting sent a proposal to compete for this grant and is pending official notification of award.

Under the oversight of the EPP Director or its authorized representative, the winning firm(s) will be required to manage the before mentioned funding streams and must deliver and provide the Scope of Services as Program Manager and Administrator detailed in **Annex A**.

6. RFP PROCEDURES

This RFP shall be governed by the procedures described in the following sections.

RFP Documents Acquisition

All documents pertaining to the procurement process will be sent via e-mail upon request at **rfpenergia@ddec.pr.gov** . Requests for proposal guidelines will be answered during business hours, which are Monday to Friday from 8:30 a.m. to 4:00 p.m.

Addendum

DDEC reserves the right to amend this RFP at any time. Any amendments to the RFP will be issued as written Addenda. Copies of each Addendum for all prospective Proposers shall be sent by e-mail or can be retrieved at DDEC's website to all the persons and entities that requested the RFP instructions.

All documents pertaining to the procurement process, including Addenda issued by DDEC, are and will be published at <http://www.ddec.pr.gov> under the section *Request for Proposal / RFPs*. All prospective proposers must monitor the abovementioned website to retrieve Addenda, if any, issued for the below-stated procurement process.

Addendum will become a part of this RFP. **All prospective proposers must monitor the Website and e-mail accounts to retrieve Addendum.**

Schedule

A summary schedule of major activities as associated with this RFP is presented in Table 1 below. The dates, times, and activities are subject to change and may be revised through the issuance of Addenda by the DDEC.

Table: 1

Event/Activity	Date
RFP Release Date	December 11, 2023
<p>Questions and Answers (Q&A) period opens.</p> <p>Questions must be submitted through rfpenergia@ddec.pr.gov the Subject must be: Questions related to RFP-DDEC-EPP-2023-003</p>	December 15, 2023
Question Period closes at 3:00 p.m. (for inquiries on RFP clarification)	December 28, 2023
DDEC provides final vendor Q&A document on ddec.pr.gov (estimated)	January 8, 2024
Proposal Deadline closes at 3:00 p.m.	January 15, 2024

Correspondence and Communications

Inquiries and communications regarding the RFP must be submitted to DDEC by the following electronic mail: rfpenergia@ddec.pr.gov . The proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open until Q&A period closes. Email is the only method of contact.

Allowed and Prohibited Communications

Only questions and requests for clarifications on this RFP submitted by prospective Proposers of this RFP are allowed. Other than these communications for clarifications purposes, communications by prospective Proposers with officials and/or representatives of the DDEC, and other Government Entities, or other relevant entities of the Federal Government, regarding any matter related to the contents of this RFP or this qualification and selection process, are prohibited during the submission and selection processes. Failure to adhere to this requirement may result in the rejection of submitted Proposals.

Verbal inquiries or e-mails sent to addresses not specified in this RFP will not be addressed by DDEC.

Submission of Inquiries

Each prospective Proposer may submit written questions as to the intent of clarity of this RFP, its attachments, and its Exhibits. Proposers must submit all questions in writing on or before the submission deadline established in this RFP to the electronic mailing address specified in Section 6.4 of this RFP. Inquiries shall be submitted by prospective Proposers using the document titled Form for the Submission of Inquiries included as Appendix J.

Questions shall be clearly labeled and shall cite the Section(s) and page number in this RFP or other document that forms the basis of the question. Questions may be in Spanish or English.

Responses to all Proposers' questions will be distributed as an Addendum to this RFP on or before the date established in Table 1 in this RFP.

Representations for Proposal Submission

All costs associated with the Proposal in response to this RFP are the sole responsibility of Proposer. Neither DDEC, the Government of Puerto Rico, nor any of its government entities or its instrumentalities, or other relevant entities of the Federal Government, will be responsible for any expenses in the preparation and/or presentation of the Proposals, oral presentations or for the disclosure of any information or material received in connection with this RFP.

No individual, or firm, is assured of obtaining any work because of this RFP process.

DDEC reserves the right, without limitations, to reject partially or completely all Proposals received in response to this RFP when, in its opinion, the Public Interest, the best interest of the Government of Puerto Rico or DDEC, will be served by such action. DDEC further reserves the right, without limitations, to make such investigations as it deems necessary as to the qualifications or perceived conflicts of interest of all firms submitting Proposals in response to this RFP. The mere appearance of a conflict of interest shall constitute sufficient cause for the outright rejection of a Proposal. If any or all Proposals are rejected, DDEC reserves the right, without limitations, to re-solicit Proposals.

By submitting a Proposal, the Proposer shall adhere to complying with all applicable Federal and Puerto Rico laws and regulations.

DDEC reserves the right, without limitations, to: (i) grant more than one contract and/or select more than one qualified Proposer; (ii) amend the Contract(s) of the Selected Proposer(s) to, among others, extend its original duration, as further explained in this RFP, or to extend its scope to include work.

Proposal Modification or Withdrawal

A Proposer may modify or withdraw a Proposal at any time before the Proposal Due Date. The withdrawal must be submitted in writing to the electronic mailing address specified in Section 6.4. of this RFP and directed to the Evaluation Committee of DDEC. Timely withdrawal of a Proposal does not prejudice the right of a Proposer to submit another Proposal by the Proposal Due Date. No oral, telephonic, or facsimile modification of a Proposal shall be recognized. After the Proposal Due Date, corrections or withdrawal of Proposals may be permitted only if the Proposer can show clear and convincing evidence that a mistake of a non-judgmental character was made, the nature of the mistake, and the Proposal price intended.

All decisions to allow correction or withdrawal of a Proposal shall be supported by a written determination signed by DDEC's Contracting Officer or Procurement Director, as delegated

official after the Proposal Due Date. Changes in prices or other provisions of Proposals prejudicial to the interest of the DDEC or fair competition will not be permitted.

Ownership of Proposals

All materials submitted in response to this RFP shall become the property of DDEC and will not be returned. The selection or rejection of a Proposal does not affect this provision.

Requirements for Legal Entities

Proposers that are Puerto Rico based corporations, limited liability companies, partnerships, or any other legal entity, shall be duly and properly organized or registered in compliance with the applicable laws of Puerto Rico. Such entities must show that they are in "good standing" at the time of Proposal submission. In the event the Proposer is a foreign legal entity, including US-based entities, it shall be duly and properly organized and/or registered in compliance with the applicable laws of its place of organization and/or incorporation. Such entities must show that they are in "good standing" within their jurisdiction at the time of Proposal submission. If a Contract is awarded to a foreign entity Proposer, said Proposer should request authorization to do business in Puerto Rico before the execution of the contract.

Federal Grant Requirements/Penalties

The procurement of proposals undertaken in compliance with the federal guidelines outlined in the "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards Final Rule" (also known as the Super-circular or Omni-circular). All contractor(s) selected under this RFP must follow the guidelines outlined in this circular. This final guidance supersedes requirements from OMB Circulars A-21, A-87, A-110, and A-122; Circulars A-89, A-102, and A-133, and the guidance and advice in Circular 1-50 on Single Audit Act follow-up and the final guidance located in Title 2 of the Code of Federal Regulations.

The funds to award the contract(s) are governed by BIL WAP, IRA section 50121, 50122 and 60103 regulations; local, state, and federal laws, regulations, and directives; and 2 CFR *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*. The selected service provider(s) must be knowledgeable of the allowable costs for this funding stream to avoid the potential for disallowed costs.

Under the direction of the EPP-DDEC, the winning Respondent will develop and agree the scope and delivery of this work, taking account the presented needs and most importantly the timeframe within which the work must be completed.

7. GENERAL INSTRUCTIONS

To ensure uniformity with specific requirements and prompt reference among all Proposals, the format of the Proposals shall adhere to the following parameters:

7.1. Proposal Format

All proposals should follow the format provided. Responses will be reviewed for completeness before detailed evaluation. Any response submitted in a manner that makes evaluation unnecessarily time-consuming may be eliminated from further consideration. Elaborated proposals are not necessary. Quality, substance, brevity, clarity, and responsiveness to the DEDC's needs are essential and required.

- Take the time to use language that is clear and concise and responds to the rating factors listed below. “*Over-written*” submissions will reflect negatively to the Proposer’s ability to prioritize and communicate in an effective manner.
- Proposals shall be type written in English or Spanish, on standard 8 ½” x 11” paper. Pages shall have a one-inch margin and the font shall be 12-point pitch size.
- All documents that need a signature as part of the Proposal shall be signed in blue ink. Documents consisting of more than one page that require signature shall contain the initials of the Proposer’s Authorized Representative at the right-top corner of every page.
- All names must be included below each signature.
- Proposals’ cover page shall include the Proposer’s name, contact information, mailing address, the RFP submission date, and the Project Title.
- Figures and tables must be numbered and referenced in the text by that number. They should be placed as close as possible to the referencing version.
- Written content of the Proposal can be presented in double line spacing. Insertion of tables, graphs, calculations, and projections may be written in single line spacing, as needed. Larger paper (up to 11" x 17") and smaller fonts are permissible for charts, diagrams, spreadsheets, etc.

7.2 Technical Proposal Organization

Table of Contents:

The Proposal shall contain a Table of Contents to facilitate the DEDC’s consideration and evaluation. It is the Respondent's responsibility to ensure that all sections of the Proposal, including all Attachments, are identified and easy to locate. The Table of Contents should read as follows:

Cover Page:

The title page shall contain the RFP subject; the name, email, and postal address of the Respondent; the name, title and telephone number of the person authorized to represent the Respondent; and the date of the Proposal.

Transmittal Letter:

The letter of interest shall contain a general statement of the purposes for submission of a Proposal. It should briefly state the operational concept for the services (Project Approach), complying with the requirements of this RFP, demonstrate its understanding of the needs hereunder and the Respondent's commitment to providing the services by the provisions of this RFP.

Tab 1: Executive Summary:

This part of the response to the RFP should be limited to a brief narrative highlighting the Respondent's Proposal. It should succinctly include qualifications and experience regarding the Respondent's ability supply the services requested in this RFP. The section should limit technical jargon and marketing information and focus instead on qualifications, experience, assumptions, and a summary of the Respondent's ability to meet the business partnering requirements of the DEDC, as stated in this RFP. The Executive Summary should be limited to a maximum of five pages (Times Roman, size 12, single space).

Tab 2: Company Information:

- 1) Name of the Company or Entity
- 2) Corporate Registration Number in the State Department (if applicable)
- 3) Postal Address
- 4) Telephones
- 5) Facsimile
- 6) Email address
- 7) Name, Position and Signature of the Authorized Representative or Contractor
- 8) Direct phone, cell phone and email address of the Authorized Representative
- 9) Employer Social Security Number
- 10) Number of the Merchant-Treasury Registration Certificate
- 11) Policy Number-State Insurance Fund
- 12) Organization chart of the firm

Respondents are expected to address the following information items within this section of the Solution Proposal:

Background Information: The Respondent shall submit a brief history describing its experience providing services, like the ones specified herein.

Type of Organization: The Respondent shall specify the type of organization, D/B/A, Corporation, Partnership, Joint Venture, or Sole Proprietorship.

Description of the Organization's History: If applicable, the Respondent shall describe the Respondent organization's history, including the ownership, operations, management and staff, subsidiaries, affiliations, and office locations of the organization.

Organizational Documentation: Certifications depending on the type of organization. The Respondent shall submit copies of the Certificate of Incorporation, Partnership Agreement or Joint Venture; and any other organizational document deemed necessary.

Financial and Responsibility Information: All Respondents shall submit financial information (See Section 7.1.3. FINANCIAL REQUIREMENTS) that will enable the DEDC to evaluate its financial capacity to perform under the contract.

Tab 3: Approach to Scope of Services (Strategy and Methods)

Respondents are expected to address the following information items within this section of the Proposal:

- Overall description of the proposed solution
- Overall description of the approach and methodology
- Delivery time readiness for services in this RFP
- Risk management approach
- The purpose of this section is to provide all the information needed by the DEDC to fathom the implications of the services procured.

Although the DEDC recognizes that it may require additional information from specific Respondents concerning this section of the Proposal, it must be evident that Respondents have made a reasonably effort to formulate a responsible project approach.

Tab 4: Resumes of Key Staff and Consultants

Provide a personnel roster and resumes of key staff who shall be assigned by the Respondent to perform duties or services under the contract. Include an estimated number of hours to be worked on the contract for each person. Provide a resume, including education, licenses, valid certifications, background, accomplishments in managing SEP, WAP or ARRA funds in Puerto Rico and any other pertinent information of the Respondent, key staff, and consultants. Provide an organizational chart highlighting the key people who shall be assigned to accomplish the work required by this RFP, illustrating the lines of authority. And designate the individual responsible for the completion of each service component and deliverable of the RFP.

The Respondent shall provide the names of specific clients for whom similar services requested in this RFP has been delivered. Any licenses or certifications applicable to the services requested in this RFP should be submitted.

Tab 5: References for Services Performed

The Respondent will provide at least three recent references (within the last five years), including client names, contact persons, phone numbers and a description of services provided.

Tab 6: Attachments

7.3. Proposal Execution

An authorized representative of the Respondent shall duly execute the Proposal. To constitute proper execution, the Proposal shall be in strict compliance with the following:

- **Individuals:** Proposals submitted by Individuals shall be signed by them. If the Proposal is signed by an authorized representative, a power of attorney, dated and executed by the individual shall be attached to the Proposal, as evidence of the representative's authority to sign the Proposal and to bind the Proposer thereto.
- **Partnerships:** Proposals submitted by a partnership shall be signed on the partnership's behalf by at least one general partner or by an authorized representative of the partnership. If an authorized representative signs the Proposal, a power of attorney, dated and executed by all partners of the Proposer shall be attached to the Proposal, as evidence of the representative's authority to sign the Proposal and to bind the Proposer.
- **Corporations:** Proposals submitted by for-profit and non-profit corporations shall state the correct name of the corporation and must be signed by an authorized officer, whose authority to bind the corporation must be evidenced by the corresponding corporate resolution. The title or position occupied by the corporate officer executing the Proposal shall appear below the signature.
- **Joint Venture:** Proposals submitted by a joint venture shall be signed by all members of the joint venture. If the Proposal is signed by only one member of the joint venture entity, the Proposal shall be accompanied with a copy of the joint venture agreement evidencing that the Proposal is signed by a member with authority to bind the joint venture. The joint venture agreement shall be executed before the date and time specified for the proposal submission.

7.4. Proposal Submission

Proposals are to be submitted on the Proposal Due Date. Responses to the RFP submitted after the prescribed deadline will not be accepted.

Date: January 15, 2024

Time: 3:00 p.m.

Any Proposal received after this date and time shall be recorded as late and retained unopened in the procurement file.

The DEDC expressly reserves the right to extend or otherwise amend the Proposal Due Date via Addendum.

7.4.1. Emailed Submissions:

Through email will be the only method to receive bids/proposals / responses (collectively known as submissions) from vendors (i.e., bidders, proponents, or Respondents) for all types of solicitation methods and contracts.

- Proposals must be saved in PDF format. The format must be “text searchable” and no scanned or “image” only document.
- The PDF file must be 25 megabytes or smaller.
- The PDF file must be submitted via email to **rfpenergia@ddec.pr.gov**
- RFP number and company name must be included in the subject line of the email.
- The PDF file shall be named using the following format: RFP-DDEC-EPP- 2023-003 Company Name. PDF.
- Proposals must be received by the DEDC on or before the due date and time specified in each RFP.
- The DEDC will not consider any proposals that are submitted to an email address different from the one specified in the instructions. **NOTE: the email used to receive the RFP guide requests and submit questions regarding the RFP is the same email to submit the Proposal.**
- The DEDC recommends Respondents to send **one** email with their complete submission whenever possible, and if it is not possible, clearly explain what the DEDC should consider as the final and full submission.
- The DEDC may request the Respondent to clarify which of the emailed documents should be considered as their final and full submission. However, the Respondent will not be able to submit additional information in response to this clarification.
- Only the emails received on time are going to be considered, which may mean that only some of the emailed documents are considered if a submission is sent in multiple emails.
- There are risks associated with sending submissions via email, including but not limited to delays in transmission between the sender's computer and the DEDC's electronic mail system.
- The DEDC recommends that the email be sent with a delivery receipt request.
- If an email is rejected or if an automated email is not received confirming that the email was received, contact Yelitza Torres at (787) 758-4747 ext.25664.
- Any email containing a virus or malware will be rejected.
- The DEDC's designated staff will not open any emailed attachments prior to the closing of the submission period and, if one or more files cannot be opened (e.g., are corrupted), the Respondents will not have an opportunity to resend such files after closing.
- The Respondent is responsible for the choice of the method ("channel") they use to submit the Proposal. The DEDC does not assume any responsibility for delayed or rejected emails or for any files that cannot be opened.

- The Respondent acknowledges that all risks associated with emailed submissions are their sole responsibility and that late submissions, regardless of the reason, will be rejected.
- The COST PLAN must be submitted as a separate file. None of the financial proposal data is disclosed in other submission documents.

8. TECHNICAL REQUIREMENTS

Each complete package of a Proposal shall comply with the technical information specified in the following sections.

8.1. Mandatory Requirements

Exhibit A provides a checklist of the documents and forms that must be submitted satisfactorily to show evidence of satisfying Mandatory Requirements.

Proposers shall comply with the following Mandatory Requirements for their Proposals to be evaluated on their Qualification and Work Approach Requirements. Mandatory Requirements will be scored as either “Pass” or “Fail”. If the Proposal meets all Mandatory Requirements of this RFP, the Proposal will “Pass” the Mandatory Requirements evaluation.

If the Proposal does not meet all Mandatory Requirements of this RFP, the Proposal will “Fail” the Mandatory Requirements evaluation. **Failure to comply with each of the Mandatory Requirements of this RFP will result in the disqualification of the Proposer.** However, the DEDC reserves the right to waive minor irregularities and minor instances of noncompliance.

Mandatory Requirements for this RFP are as follows:

8.1.1. Proposal Submission

The Proposal must be submitted within the closing date and time for Proposals, as established in Section 6.4 of this RFP.

8.1.2. Organizational Documents

Include all documents that demonstrate that the Proposer:

1. Is properly organized and/or registered and in compliance with the laws of its place of incorporation.
2. Is in “good standing” with the Government of Puerto Rico or with their jurisdiction of incorporation.

8.1.3. Financial Requirements

The Proposer shall demonstrate in the Proposal that has adequate financial resources to perform the services under the contract. Accordingly, the Proposer shall provide the following financial information to allow the DEDC to evaluate its financial capability:

The Respondents that generate over \$1 million annual revenue must provide the audited financial statements for the past two (2) years and that include, as minimum, income statement and balance sheet. Those generating less than \$1 million annually may submit a reviewed financial statement if an audited report is not available, for the past two (2) years. All Respondents shall submit the availability of bank credit or other information that will enable the DEDC to evaluate its financial capacity to perform under the contract.

The financial information requested is based upon circumstances existing at the time the RFP is released. The DDEC reserves the right, without limitations, to: (i) modify the requirements of the information; (ii) request additional information or clarification during the evaluation process and, if appropriate, (iii) modify the minimum score requirements; all in the best interest of the DEDC's action plans.

8.1.4. Conflicts of Interest

Pursuant to Act 12 of July 24, 1985, as amended and known as the Puerto Rico Government Ethics Act of 2011, Act 237 of August 31, 2004, known as Act to Establish Uniform Parameters in the Procurement Processes of Professional and Consulting Services for Commonwealth Agencies and Government Entities, and/or Act 2 of January 4, 2018 known as the Anticorruption Code for a New Puerto Rico, Proposers will be required to certify that no officer, agent or employee of the Government of Puerto Rico or its Government Entities and instrumentalities, has a monetary interest in the Proposal or has participated in contract negotiations on behalf of the Government of Puerto Rico; that the Proposal is made in good faith without fraud, collusion or connection of any kind with any other Proposers; that the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm; and that the Proposer has not been convicted or has pleaded guilty in a state of federal court or any other jurisdiction of the United States of America, or another country if the elements which constitute the crime are the same, of certain crimes constituting fraud, illegal appropriation or misuse of public funds, for the terms stated in Act 2-2018.

8.2. Qualifications

The DEDC will evaluate proposals based on the Qualification Criteria listed below. It will rank order submissions and determine which Proposal submissions best align with the needs of the EPP. Respondents must have the required experience as detailed in Table 2 of the Staff Requirements Section of Annex 1 Scope of Services.

Respondents shall ensure that they submitted sufficient information to demonstrate the knowledge, experience, and expertise necessary to complete the tasks and provided the services

specified herein, to allow the DEDC to determine their qualifications based on the provided information.

If the Proposer intends to subcontract some of the proposed work from another firm or consultant, similar information should be provided for each subcontractor. **The maximum points for Qualifications Criteria are 55 points.**

To evaluate the Qualifications Criteria, Proposals must comply with each of the following requirements:

8.2.1. Experience and Qualifications (Maximum of 15 Points)

- Describe your experience providing, in Puerto Rico, the services described in this RFP, including those for WAP, SEP or ARRA funds.
- Include three references.
- Evidence that the Respondent possesses the knowledge and capability of the individual consultant or legal entities necessary to perform adequately and meet contract requirements. Evidence should be based on past performance and client references.

8.2.2. Profile of Business (Maximum of 15 Points)

- Applicants must submit a Profile that must include how the business qualifies to deliver the proposed services and the business Statement of Values and Key Factor for Success. May not exceed five (5) pages.

8.2.3 Organizational Chart (Maximum of 15 Points)

- Proposers must provide an organizational chart identifying team members and flow of authority that reflects the Staffing Plan for the deployment of the proposed scope of work. Identify key staff within the Respondent's organization that has been or will be instrumental in providing sound management experience and direction to the organization in the delivery of the services under the Agreement.
- Must include the individual resume or summary of qualifications for the key staff assigned to this Project, addressing their experience and capabilities to perform the required work. No more than two pages per resume.
- The Proposal shall identify and include any professional memberships, licenses, certifications, or accreditations held by the company, the company executives, or the critical staff personnel.

8.2.4. Financial Analysis (Maximum of 10 Points)

Proposer's financial statements will be evaluated using basic financial analysis to determine if the Proposer is financially stable.

8.3 Approach to Scope of Services to be delivered (Strategies and Methods)

Proposers shall draft and submit their approach as part of the Proposal. The **Work Approach will have a maximum score of 30 points**. The document must clearly identify the following:

- The Proposer's approach or plan for implementing each element of the Scope of Work.
- The Proposer's capabilities and abilities to provide responsive coordination for Scope of Work. Include a brief description of how the Proposer will address the required tasks.

9. COST PROPOSAL REQUIREMENTS

9.1 Budget (Cost Requirements of the Proposal)

Reasonable pricing will be considered as part of the evaluation, but it is not the sole or determining factor in selecting the successful Proposer (s).

The Respondents must clearly and unambiguously establish a fixed budget to complete the delivery of the services within the time frame established by the EPP. Include in the preceding all meetings, staff time coordination, and required project expenses. **The Budget will have a maximum score of 15 points.**

The Cost Proposals must be accompanied by a narrative to the budget submission that clarifies all significant plans and assumptions related to the budget.

Respondents are expected to establish the cost for the entire Case Management Services, by stating the number of workdays per services, milestone, or deliverable (as per the proposed services approach and methodology) and establishing the corresponding cost at the same level.

Finally, the Cost Proposal must state that the costs quoted are valid for one hundred and eighty (180) days from the proposal submission date. Also, once the contract is awarded, charges quoted must be accurate for the duration of the contracted services.

Note: The Respondent shall be solely responsible for all expenses incurred in preparing a response to this RFP and shall be responsible for all costs associated with any presentations or demonstrations, contract negotiation and related expenses related to this request and any proposals made.

Subcontracting of Services

The proponents shall be prepared to furnish a general list of all subcontractors that it intends to utilize for the Project.

9.2 Proposer's compensation

Proposer's compensation will be determined as follows:

- Proposers will be compensated based on unit prices for each milestone of work achieved. The unit prices provided will include all expenses and any other additional fees applicable to the services requested.

After the Qualifications and Work Approach have been evaluated and initial Cost Proposals are reviewed, the DEDC may exercise its option to negotiate compensation with the Proposer (s).

The bidder must use the following table to calculate the cost, include costs for the services already detailed and include any other additional costs:

Services	Cost per Hour

Note: The bidder will have to consider in its costs that there may be (activation of services) emergency services that will be required with less than 24 hours to perform.

10. PROCUREMENT AND AWARD PROCESS

10.1. Receipt of Proposals

Proposals will be dated, and time stamped immediately upon their receipt at the DDEC's Office as evidence of timely delivery.

Only Proposals timely received will be considered and evaluated. No Respondent may modify, withdraw, or cancel his Proposal or any part thereof after the Proposal Due Date, except as required in writing by the DEDC, this RFP and the applicable legal and regulatory requirements.

Submittal of Proposals shall serve as evidence of a Respondent's acceptance of the terms, conditions and disclaimers of this RFP and the rights and options reserved hereunder by the DEDC.

All proposals shall remain valid for a period of one hundred and eighty (180) days after the date specified for the receipt of proposals.

Following the receipt, the response of all Proposers will be reviewed to determine that: (i) each Proposal has been submitted following the requirements of this RFP; (ii) each Proposal is complete and (iii) all required documentation was included with the Proposal.

Proposals will be evaluated by the DEDC, as described in the following sections.

10.2. Evaluation Committee

The Evaluation Committee appointed by the Secretary of the DEDC will review and score the different sections of this RFP, as well as make final recommendations to the Secretary. The Committee shall conduct a comprehensive, fair, and impartial evaluation of Proposals received in response to this RFP.

Following receipt, the responses of all Proposers will be reviewed for completeness and analyzed based upon the criteria described in this RFP. An initial evaluation will consider the Mandatory Requirements of the Proposal. Those who meet the Mandatory Requirements will then be evaluated by the Evaluation Committee for Qualification, Work Approach and Budget or Cost Requirements of the Proposals.

The Evaluation Committee may request clarifications to Proposers, to assist in gaining additional understanding of the Proposals. A response to a clarification request must be to clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal.

Technical Committees may be convened by the Evaluation Committee, as deemed necessary.

The Evaluation Committee shall then prepare a written evaluation report to document the ranking of the Proposals by technical and cost merits. The Evaluation Committee report will be submitted to the Secretary of Economic Development with the corresponding recommendation for adjudication.

10.3. Errors and Omissions in Proposals

The DEDC reserves the right, without limitations, to reject a Proposal that contains an error or omission. It also reserves the right, without limitations, to request correction of any errors or omissions and/or to request any clarification or additional information from any Proposer, without opening clarifications for all Proposers.

10.4. Proposal Scoring

Proposers will be awarded points based on their qualifications and work approach requirements. **Table 2** presents the maximum points for the requirements of Proposals. For details regarding the distribution of points for each technical aspect of the Proposal, refer to the corresponding section.

Table 2: Proposal Scoring

Criteria	Maximum Points
Mandatory Requirements (Section 7.1)	Pass/Fail
Qualifications (Section 7.2)	55 points
Approach to Scope of Services (Section 7.3)	30 Points
Cost Proposal (Budget) (Section 8)	15 Points
Total Maximum Scoring	100 points

To be considered a “Qualified Proposer”, Proposers need to obtain a score greater than or equal to seventy-five (75) points in the evaluation of their Proposals.

10.5. Interviews and Proposal Refinements

The DEDC reserves the option to engage in interviews with Proposers that it considers viable candidates, to discuss questions and/or considerations that can provide better clarity to refine proposals.

10.6. Negotiations

After the corresponding evaluation of the Proposals, The DEDC will select all Qualified Proposers for negotiations. Negotiations are exchanges between the DEDC and Proposers that are undertaken with the intent of allowing the Proposers to revise their Proposals.

If the DEDC is not satisfied with the price offer of the Respondent, they will recommend doing further discussions/negotiations.

The primary object of discussions is to maximize the DEDC’s ability to obtain the best value, based on the requirements and the evaluation factors outlined in the RFP. The DEDC’s Evaluation Committee may request and receive best and final offers.

10.7. Selection and Award

Proposer(s) to be selected for the award will be based on the Proposal Scoring stated in Section 9.4 and the negotiations from Section 9.6. The DEDC, based on the overall Proposals received and their evaluation results, shall determine the number of successful proposers that represent the best interest of the overall programs implementation and the people of Puerto Rico.

The Proposer(s) to be awarded the RFP shall be recommended by the Evaluation Committee. After the final recommendation from the Evaluation Committee, the Secretary of the DEDC will issue the Award Notice.

Award will be made to the responsible and responsive Respondent whose Proposal represents the best value to the DEDC, taking all elements (including price and technical score) into consideration. Award will be made at fair and reasonable prices only. The DEDC reserves the right to select a proposal other than the lowest price from a Respondent within the competitive range.

A proposal must conform to the material requirements of the RFP. If the Proposal does not conform to the solicitation, it will be rejected because it is considered non-responsive.

The Secretary of Economic Development shall review the Report of the Evaluation Committee and shall identify the Respondent(s) that should be selected to provide the services requested by this RFP. The determination of a Respondent's selection will be based on the merits of the Proposal presented, following the evaluation criteria. However, the Secretary of Economic Development, taking into consideration the Respondent's Proposal and the Evaluation Committee recommendation, shall identify for selection the Respondent(s) as deemed most advantageous to the DEDC's interests and objectives.

10.8. Award without Negotiation

If, after the initial evaluation of Proposals, there is a clear winner and there is no need to negotiate or obtain further clarification or information from that Respondent (e.g., the price is reasonable), the Secretary of Economic Development may proceed directly to award, provided that the RFP clearly stated that award could be made without negotiations.

10.9. Notice of Selection

The DEDC will issue a written notice of selection to the successful Proposer(s) through certified mail to the address provided as part of the Proposal (the "Notice of Selection"). The Notice of Selection will establish the selected Proposer(s) obligation to submit any applicable post-award documentation.

10.10. Execution of Agreements

The DEDC will seek to execute a Service Agreement with the selected Proposer(s). If an agreement cannot be reached, the DEDC may terminate negotiations with the chosen Respondent(s) and proceed to the next-highest rated Respondent until an agreement determined to be fair and reasonable to both parties is obtained.

No Proposal shall be binding upon the DEDC until an Agreement has been executed. The DEDC reserves the right to issue press releases or public statements regarding the services under the contract; and the right to cancel the award of an Agreement at any time before execution of the contract, without incurring in any liability.

10.11. Rejection of Proposals and Cancellation of RFP

Issuance of this RFP does not constitute a commitment by the Government of Puerto Rico and/or the DEDC to award a contract. The DEDC reserves the right, without limitations, to accept or reject, in whole or in part, and without further explanation, any or all Proposals submitted; and/or to cancel this solicitation and reissue this RFP or another version of it, if it deems that doing so is in the best interest of the public interest, the Government of Puerto Rico, the DEDC or the impacted communities.

The DEDC reserves the right, without limitations, to disregard or waive any noncompliance, informalities and/or irregularities in the Proposals received in response to this RFP, not otherwise identified as Mandatory Requirements and Qualifications in this RFP when, in its opinion, the public interest, the best interest of the Government of Puerto Rico, the DEDC or of the impacted communities will be served by such action.

10.12. Confidentiality of Responses and Proprietary Information

Upon completion of the RFP process, the DEDC will make public its report regarding the qualification, procurement, and selection process, which shall contain certain information related to this RFP process, except trade secrets, proprietary information or privileged and confidential information of the Proposers, so identified by Proposers. Accordingly, all Proposers are suggested to submit a redacted copy of their Proposal at the time of submission. For clarity, “redacted copy” refers to a copy of the Proposal that has been modified, edited, or revised and any confidential or sensitive information has been removed.

The DEDC reserves the right, without limitations, to make public the redacted copies of the Proposals at the conclusion of the RFP process. If a redacted copy is not submitted by a Proposer, the DEDC will assume that the original copy of the Proposal can be made public. Proposals containing substantial contents marked as confidential or proprietary may be rejected by the DEDC.

The DEDC cannot guarantee that confidentiality or proprietary claims made by a Proposer, in any way, will be honored. Due to the nature of this RFP, some confidentiality or proprietary claims cannot be assured. Provision of any information marked as confidential or proprietary shall not prevent the DEDC from disclosing such information if required by law. The ultimately awarded contract(s) and all prices set forth therein shall not be considered confidential or proprietary, and such information may be made publicly available.

All information, be it trade secrets, proprietary or confidential, submitted as part of this RFP, will be made available to the DOE, the US Office of Inspector General or any other federal or state agency that requires said information for program evaluation and compliance purposes.

10.13. DEDC Options

Without limitation and in addition to other rights reserved by the DEDC in this RFP, and when it is determined to be in its best interests, the DEDC reserves and holds, at its sole discretion, the following rights, and options:

- To reject any Respondent that has a poor performance record, as demonstrated by past work performed for the DEDC, specifically from the standpoint of work quality and progress.
- To reject any Proposal due to uncompleted work, which, in the judgment of the DEDC, might hinder or prevent the prompt completion of additional work, if awarded.
- To reject a Proposal if any of the Respondent's previous agreements with the DEDC or any other public or private entity declared in default.
- To conduct further investigations regarding the technical and financial qualifications of Respondents from any sources deemed necessary, which might be others than those identified in the Proposal.
- To reject a Proposal if there are unauthorized additions, conditional or alternate proposals or irregularities of any kind which may tend to make the Proposal incomplete, indefinite, or ambiguous.
- To cancel, without prejudice, any selection of Respondents before the execution of the Agreements.
- To reject Proposals from a Respondent shown to be submitting Proposals under different names for the same services.
- To reject Proposals upon evidence of collusion among several or all Respondents.
- To take any action affecting the RFP process or the subject matter of this RFP, that would be in the best interests of the DEDC.
- Failure to provide any of the above-requested information shall be considered a substantial defect. All documents and products created by the Respondent's and their sub-consultants shall become the exclusive property of the DEDC.
- By submitting a Proposal, each Respondent agrees, if the Proposal is accepted, to enter a contract with the DEDC for the term outlined in this RFP.
- Each Respondent also accepts all terms and conditions of this RFP and any amendment thereof. The Respondent's Proposal and any additional information submitted by the Respondent or negotiated between the Respondent and the DEDC before the selection, together with this RFP and any addenda hereto, will serve as confirmations of the Respondent's acceptance of all terms and conditions therein.

11. ADMINISTRATIVE PROCEDURE AND APPELLATE REMEDIES

Any person, party or entity that considers itself having been adversely affected by the Award Notice or award determination of the Secretary of the DEDC, made in relation to this RFP, may file a petition for reconsideration before the Secretary within the twenty (20) days from the date on which the copy of the Award Notice is duly notified, as established in Act 38-2017, known as the Uniform Administrative Procedures of the Government of Puerto Rico

Act. This is a jurisdictional term not subject to any extension. Failure to timely file the petition for reconsideration will preclude the Secretary of the DEDC from considering the same.

The applicable terms for the filing of a judicial review petition before Puerto Rico's Court of Appeals in relation to this action or lack of action by the Secretary of the DEDC, shall be those established in Act 38-2017 for bids procedures, particularly, in Sections 3.19 and 4.2. Simultaneously with the filing of the petition for reconsideration, the petitioner shall submit a copy of the petition to all the parties in the procedure and to the Secretary of the DEDC.

The mere filing of a petition for reconsideration before the DEDC's Secretary or filing of a judicial review petition before Puerto Rico's Court of Appeals will not have the effect of halting the contested award.

12. CONTRACT

12.1 Type of Contract

The DEDC expects to award a contract for the delivery of services for the selected suppliers(s) for the services. Fees will be paid after the firm's monthly report is submitted to the DEDC, which will evaluate and recommend the payments to be issued.

12.2 Contract Period:

The DEDC intends to execute a contract with the Proposer(s) selected under this solicitation. The professional services contract will have effectiveness of one-year. This period includes all administrative tasks, the startup of services, the services included in the Proposal and the final payment upon completion.

12.3 Performance Period

The Performance Period for this Agreement is for a maximum of one year, including holidays, from the day stated in the contract. The time is included in the Contract Period and is not to be considered as in addition to the Contract Period. The duration of the services will be as per Statement Work and as agreed to by the parties.

12.4 Payments

Payments shall be issued for services provided, previously approved by the DEDC. It is the Selected Proposer's responsibility to provide all services, as set forth under the Scope of Work detailed in this RFP.

Payment will be made upon presentation of invoice evidenced by the services provided and duly authorized by the DEDC. Selected Proposer must submit all required invoice supporting documents, including but not limited to, monthly reports, timesheets, expense plans, work projections and any other documentation that supports the services provided. Invoices must be submitted within the first ten (10) calendar days from the end of the period for the services being invoiced.

If the DEDC finds the submitted invoice and supporting documents as acceptable, then the invoice will be approved and processed for payment promptly after submission of the invoice. The DEDC reserves the right to review the correctness of invoices and perform audits as it deems necessary.

The Selected Proposer shall submit monthly invoices for the agreed fees or in accordance with the contractual clauses reached. Invoices must be detailed, specified, and itemized, accompanied by a description of the services provided, as previously approved by the DEDC. In addition, it shall be noted that no public servant of the contracting entity is a party or has interest on the profits or benefits product from the contract, regarding the invoice. If it does have interest in some part on the profits or benefits of the contract, it must specify that a waiver has been mediated.

The DEDC shall request from the Selected Proposer all the necessary information related to the invoiced expenses, to verify them, before ordering the release of payment.

The Selected Proposer will deliver the original invoice to the DEDC as per the terms of the contract. Such invoice must be properly completed and certified by the Selected Proposer. Upon receipt, the designated office within the DEDC will process it for certification, per the Internal Revenue Code of Puerto Rico, following the standards and regulations established by enforcement agencies of the Government of Puerto Rico.

Thank you for your interest in participating in the BIL WAP, IRA section 50121, 50122 and 60103 funds to be awarded to the EPP for the economic growth of Puerto Rico.

13. REFERENCES

The following links are references to the services requested, in compliance with the BIL WAP, IRA section 50121, 50122, and 60103 funds.

- Energy Policy Program
<https://www.ddec.pr.gov/en/public-energy-policy-program>
- 2 CFR PART 200—*Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*
<https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1>
- **BIL Section 40551:** Weatherization Opportunities in the Bipartisan Infrastructure Law
[Weatherization Opportunities in the Bipartisan Infrastructure Law](#)
[DE-FOA-0002912 Questions & Answers](#)
- **IRA Section 50121:** HOPE for HOMES Act Program and **IRA Section 50122:** High-Efficiency Electric Home Rebate Program
[IRA HOMES and HEEHR Program Guidance](#)
[Home Energy Rebate Program Requirements & Application Instructions](#)

- **IRA Section 60103:** Greenhouse Gas Reduction Fund (GGRF): Solar for All Grant
[Greenhouse Gas Reduction Fund](#)
[Frequent Questions about Solar for All](#)
[About the Greenhouse Gas Reduction Fund](#)

END OF RFP

ANNEX 1

SCOPE OF WORK
Annex 1
Request for Proposals
Program Management Services
Department of Economic Development and Commerce
Energy Policy Program
RFP-DDEC-EPP-2023-003

I. Program Management and Administration scope of work requirements:

A. Program and Project Management

The Program Manager will own and oversee the application and granting process for three main grants: (1) BIL WAP Enhancement & Innovation, (2) Inflation Reduction Act, and (3) Greenhouse Gas Reduction Fund”. These programs have different objectives (see X appendix), but all will grant awards to individuals through competitive application programs. Therefore, the Program Manager will have the role of designing program guidelines (per federal guidance and compliance), managing the competitive application period, guiding the selection process (with internal committees), and assisting the internal team with funds deployment, monitoring, and reporting. More specifically the Program Manager is expected to:

- 1) Overall project management planning, which includes defining timelines and milestones and tracking the progress of all related tasks.
- 2) Establish timelines, goals, metrics, and deliverables following project funding allocations and production goals specified by the EPP Director.
- 3) Design an application form, with all necessary information that will be required for each program.
- 4) Manage the application process, which may include receiving questions from potential proponents, receiving applications (through an IT system), and processing, analyzing, and evaluating applications based on the criteria to be defined by the EPP.
- 5) Setup a formal request for information (RFI) process with applicants if additional information and/or corrections are needed.
- 6) Present to the EPP the results of the application process, which include the number of proponents, types of proposals, estimated costs, etc.
- 7) Support the EPP director by providing strategic advice at the program level.
- 8) Any other supporting functions or tasks necessary to implement an efficient and compliant program management and case management process, deliverables, and due diligence.
- 9) Manage consultants subcontracted to perform RFP tasks, if needed. This includes:
 - a) Propose key metrics to consider for all subcontractors, as well as any that should be considered optional under the circumstances they propose. The lead consultant shall

be responsible for gathering KPI data and/or including these requirements in the agreements with their subcontractors at the time of procurement and negotiation.

- b) Manage Subcontractor Budgets, Projections, and Expenditures, as well as their explanations of deviation from projections and options for corrective actions.
- c) Make clear requirements to subcontractors on how to perform their tasks, including defining the required data that shall be provided to the lead consultant and EPP Director. The lead consultant shall have a budget and expenditure review process that is approved by the EPP Director and administered throughout the term of the contract.
- d) The lead consultant shall ensure that staff and all relevant subcontractor staff engaged for any project have previous experience in delivering the services required by the programs supported within these services. Key staff must have previous experience and knowledge with the management of federal energy-related program funds and their implementation in Puerto Rico e.g. WAP, SEP, or IRRA funds for Puerto Rico.

B. Financial Tracking

1. All program spending shall be tracked against budgets and projections and reported to DDEC in an agreed-upon format and timeframe, in the aggregate, with detailed reporting available, as needed.
2. Variations from projections shall be identified as soon as possible and informed to the EPP Director so decisions can be made before any deviation from the budget. These requirements may flow down to subcontractors as needed.
3. Provide funding breakout by financial categories as required by DDEC or federal agencies.

C. Monitoring

1. Perform end-of-project monitoring to validate compliance with applicable laws and federal regulations.
2. Present to the EPP Director with a monitoring plan and interim and final monitoring reports with findings and actions taken to resolve them.

D. Other Legislative or Regulatory Compliance Topics.

1. Future legislative and regulatory changes may also affect the lead consultant's scope and budget for reporting, administrative, and review processes. The lead consultant shall propose reasonable budgets and tracking methods to manage these changing requirements as needed.

E. Document Management and Retention

1. Store, archive, and retrieve physical documents and electronic images of all paper documents, training material, internal policies and procedures, and meeting lists of attendees through a Grant Management System or similar platform, to which the EPP Director and other EPP personnel will have access.

2. All original documents related to program and project beneficiaries, regardless of the media they are stored, shall be property of the DDEC and at some point, transfer to the EPP will be required. Hence, Program Manager will need to establish and maintain protocols for physical file management which may include, among other things, file accessibility, file location tracking, file permissions, file ownership, and file return. This also requires the Program Manager to maintain adequate secure space and storage equipment to perform such functions and requires that the Program Manager maintains soft copy backups of original files in their custody. They must be available for review or inspection at any time as required by EPP Director or its authorized representative.
3. Any systems, tools, or technology provided must meet Personal Identifiable Information (PII) and confidentiality and nondisclosure requirements.
4. Ensure that they and all their subcontractors retain documents according to state and federal retention requirements.
5. Any other tasks necessary to comply with the requirements of document control management.

F. Reporting and Analytics

1. Shall be responsible for coordination, compilation, validation, and submittal of all required reports and data, including but not limited to reports to local government stakeholders, the DOE, and external stakeholders, among others.
2. For program-level management, tracking, and status Lead consultant shall develop a package of regular reporting and update meetings to inform the EPP Director of the status and to track the general health of all individual projects or funding opportunities. These procedures and reports shall be documented and agreed upon at the initiation of the engagement. Sample tools and deliverables might include project plans and Gantt charts, action item logs, budget projections and tracking, periodic written status reports, KPI and other management reports, and a cadence for recurring scheduled meetings.
3. Shall work with the EPP Director to define all reporting requirements, including but not limited to DOE or other federal reporting requirements; or reporting to local government stakeholders.
4. Shall ensure that subcontractors' contracts require these reports and corresponding tracking to ensure they are delivered on time and are complete and accurate.

G. Data Requests Response

1. The Program Manager shall assist the EPP Director with information requests that arrive from a variety of sources beyond those received in the normal day-to-day operation of programs from stakeholders.

2. Procedures will be drafted during engagement initiation to ensure the proper flow of requests and responses, approval gates, and tracking of requests to completion. Examples of such requests include, but are not limited to:

a. Act No. 141-2019 known as “Ley de Transparencia y Procedimiento Expedito para el Acceso a la Información Pública”: Some requests may be subject to an Act No. 141-2019 request and will require tracking as such with the assistance of DDEC personnel internally responsible to comply with them.

b. Legislative Branch: Legislators or the Office of the Comptroller of Puerto Rico may request data regarding program performance at the municipal, regional, district or broader island level. This needs to be considered during reporting design phases.

c. Executive Branch: Other areas of the Executive Branch may make requests for aggregated or specific data. These may include entities such as the Office of the Governor and Executive branch agencies or departments.

H. Enabling Technology and Oversight

1. The program manager is expected to use the Energy Program Management software (the software will be chosen by DDEC) as the main day-to-day work tool to manage and track all cases. The expected functionality of the platform is presented below:

- a. Full case workflow management
- b. Compliant Data reporting
- c. Document control
- d. Manage stakeholder collaboration
- e. Manage program funding
- f. Streamlined eligibility checking

2. Program Manager shall ensure their staff and all subcontractor staff are aware of, and comply with, all relevant local and U.S. federal government information technology security requirements.

3. The DDEC shall own all data related to all programs regardless of the system or medium in which it is stored. Provisions shall be included in contracts to ensure that data is transferred to DDEC and purged from the systems of the lead consultant and all subcontractors at the end of the engagement and/or specified retention period. Contract provisions should also include for protection of data against hacking or such, regardless of the system or medium in which it is stored.

I. **Media and Outreach**

1. Work in concert with the EPP Director and their retained contractors dedicated to this effort to determine media contacts, marketing outreach activities, responses, and releases at the program and individual funding opportunity level.

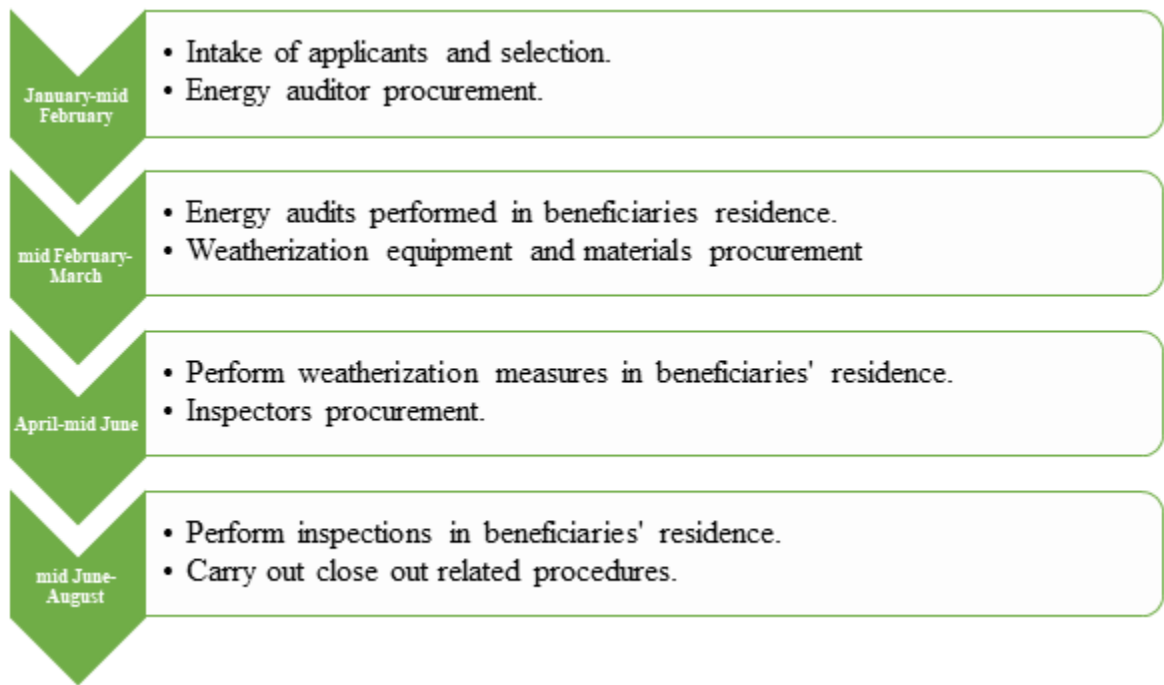
H. **ONLY for implementation required of the WAP-Bill:** In addition to the above-mentioned tasks, the following are also required

1. **Fiscal Services**

- a. Shall make requests to DDEC Finance Department, and per their guidelines, for WAP-Bill funds and manage the disbursement of these funds as needed.
- b. Shall develop the required specific supporting documentation to accompany funding requests accurately and correctly.
- c. Shall be responsible for review, quality assurance, and disbursement according to federal rules.
- d. Shall be responsible for the procurement and processing of invoices from third-party subcontractors like energy auditors, equipment and materials suppliers, and inspectors; the collection of all required documents and supporting material; and the retention and support of that documentation according to state and federal retention rules.

II. Additional considerations:

1. The DDEC priority is to start with the management and implementation of the BIL Section 40551, Weatherization Opportunities in the Bipartisan Infrastructure Law, primarily in the Vieques and Culebra municipalities. Hence, the Program Manager and its team should have the capacity to comply with the following non-negotiable 2024 timeline:



2. The other federal funded program mentioned before, will be prioritized in accordance with EPP Director needs. Hence, lead consultant should be prepared to perform management of the other programs concurrently with the management and implementation of the WAP-Bill.

3. Federal funding streams summaries:

a. **BIL Section 40551: Weatherization Opportunities in the Bipartisan Infrastructure Law**

1. The Weatherization Assistance Program Enhancement and Innovation offers free assistance to qualifying households to help establish comfortable, energy-saving homes. This federal funding opportunity provides additional funding to state WAP programs, above and beyond the typical WAP allocations, to expand the breadth and depth of their WAP offerings.

2. DDEC anticipates a total funding amount of \$38M. Plans for the funds include direct weatherization of units first in Vieques and Culebra and later in the rest of the main island municipalities.

3. New measures include weatherization of multi-family high-rises; electrification of heat pumps and ventilation systems and replacing refrigerators more than 20 years old; expanding health and safety measures for residents and contractors; and installing solar panels for qualifying low-income residents.

4. All 10% for administrative costs will be available for implementation by the Program Manager selected; DDEC will not retain any share of this percentage.

5. Links to Relevant Documents.

- [Weatherization Opportunities in the Bipartisan Infrastructure Law](#)
- [DE-FOA-0002912 Questions & Answers](#)

b. IRA Section 50121: HOPE for HOMES Act Program

1. Funding Opportunity Abstract. Section 50121 of the IRA appropriates funding to the DOE to carry out a program to award grants to State Energy Offices to develop and implement a Home Owner Managing Energy Savings (“HOMES”) rebate program. HOMES rebate programs operated by State Energy Offices must “provide rebates to homeowners and aggregators for whole-house energy saving retrofits” that begin on or after the date of funding application approval and are completed by September 30, 2031.

2. DDEC may receive up to \$42.5M for program implementation. DDEC is reviewing the final program guidance received to determine specific program design and delivery parameters.

3. DDEC will maintain a portion of the percentage that can be used for administrative costs for the implementation of IRA Section 50121. Hence, the selected consultant will have to negotiate with DDEC for a share not to exceed 6%.

4. Links to Relevant Documents

- [IRA HOMES and HEEHR Program Guidance](#)
- [Home Energy Rebate Program Requirements & Application Instructions](#)

c. IRA Section 50122: High-Efficiency Electric Home Rebate Program

1. Funding Opportunity Abstract. The low- and moderate-income program will provide upstream, midstream, and downstream consumer discounts on the purchase of high-efficiency electric home appliances.

2. DDEC may receive up to \$42.7M for program implementation. DDEC is reviewing the final program guidance received to determine specific program design and delivery parameters.

3. DDEC will maintain a portion of the percentage that can be used for administrative costs for the implementation of IRA Section 50122. Hence, the selected consultant will have to negotiate with DDEC for a share not to exceed 6%.

4. Links to Relevant Documents

- [IRA HOMES and HEEHR Program Guidance](#)
- [Home Energy Rebate Program Requirements & Application Instructions](#)

Exhibit A

Mandatory Requirements Checklist

(As per section 8.1)

Document	Included (Yes / No)
Proposal Submission Before Due Date	
Organizational Documents	
Financial Requirements	
Conflicts of Interest	