

RESPONSE INSTRUCTIONS

Department of Environment, Great Lakes, and Energy

**MI Home Energy Rebates Program & Aggregators
 Request for Information No. 250000000001**

Solicitation Manager Name: Lisa VanOstran
 Direct Phone: 517-599-7680
 Email: vanostranl@michigan.gov

This is a Request for Information (RFI) for:

EGLE is issuing this Request for Information (RFI) is to solicit responses from qualified aggregators who are interested in participating in the HER (Home Efficiency Rebate) program under the Inflation Reduction Act (IRA) Section 50121, specifically focusing on the measured approach to achieving whole-house energy savings.

RFI Timeline

| Event | Time | Date |
|--|-------------------|-----------------------------|
| RFI issue date | N/A | Wednesday, October 16, 2024 |
| Deadline for vendors to submit questions about this RFI | 3:00 p.m. Eastern | Friday, November 1, 2024 |
| Anticipated date the State will post answers to vendor questions on www.michigan.gov/SIGMAVSS | | Friday, November 15, 2024 |
| Deadline to submit response* | 3:00 p.m. Eastern | Friday, December 6, 2024 |

***A vendor’s response received at 3:00:01 p.m. Eastern is late and subject to disqualification.**

This RFI is subject to change. Check www.michigan.gov/SIGMAVSS for current information.

1. **CONTACT INFORMATION FOR THE STATE.** The sole point of contact for the State concerning this RFI is listed on the Cover Page. Contacting any other State personnel, agent, consultant, or representative about this RFI may result in vendor disqualification.
2. **MODIFICATIONS.** The State may modify this RFI at any time. Modifications will be posted on www.michigan.gov/SIGMAVSS. This is the only method by which the RFI may be modified.
3. **QUESTIONS.** Vendor questions about this RFI must be emailed to the Solicitation Manager no later than the time and date specified on the Cover Page. In the interest of transparency, only written questions are accepted. Answers to questions will be posted on www.michigan.gov/SIGMAVSS. Submit questions using the format below; a Microsoft Excel format or similar is suggested.

| Q # | Document and Section | Page # | Question |
|-----|----------------------|--------|----------|
| | | | |

4. DELIVERY OF RESPONSE.

Electronic – The vendor must submit its response, all attachments, and any modifications or withdrawals electronically through www.michigan.gov/SIGMAVSS. The price response should be saved separately from all other response documents. The vendor should submit all documents in a modifiable (native) format (examples include but are not limited to Microsoft Word or Excel and Google Docs or Sheets). In addition to submitting documents in a modifiable format, the vendor may also submit copies of documents in PDF. Attachment file size is limited to 6 MB per document. Vendor’s failure to submit a response as required may result in disqualification. The response and attachments must be fully uploaded and submitted prior to the response deadline. **Do not wait until the last minute to submit a response**, as the SIGMA VSS system requires the creation of an account and entry of certain information, in addition to uploading and submitting the materials. The SIGMA VSS system **will not** allow a response to be submitted after the response deadline identified in the solicitation Closing On/Closing Date fields (Summary view/Detail view), even if a portion of the response has been uploaded.

Questions on how to submit information or how to navigate in the SIGMA VSS system can be answered by calling **(517) 284-0540 or (888) 734-9749**. The Solicitation Manager will not provide assistance related to the submittal of the response and all attachments on the day of the response deadline. Responsibility for a complete submission lies with the vendor.

Note that all documents and information submitted in any manner as part of a response will become public record immediately upon receipt by the State.

5. **ORAL PRESENTATION.** The State reserves the right to invite some vendors for oral presentations and/or interviews.
6. **GENERAL CONDITIONS.** The State will not be liable for any costs, expenses, or damages incurred by a vendor participating in this RFI. This RFI is not an offer to enter into a contract. The vendor understands that their response will become public record immediately upon receipt by the State. Other than verified trade secrets, responses submitted via www.michigan.gov/SIGMAVSS are the State’s property.

- 7. CONFIDENTIAL TREATMENT FORM AND THE FREEDOM OF INFORMATION ACT.** As a public record, all portions of the vendor's response is subject to disclosure as required under Michigan's Freedom of Information Act (FOIA), MCL 15.231, et seq. However, the State may exempt some information from disclosure as permitted by law. Under MCL 18.1261(13)(b), records containing "a trade secret as defined under section 2 of the uniform trade secrets act, 1998 PA 448, MCL 445.1902," are exempt from disclosure under FOIA. In addition, "financial or proprietary information" submitted with a vendor's response is exempt from disclosure under FOIA. **A vendor's failure to comply with this Section is grounds for rejecting a vendor's response as non-responsive.** As a part of its response, each vendor must follow the procedure below.
- a. **SUBMIT A COMPLETED "CONFIDENTIAL TREATMENT FORM" (CT FORM) WITH YOUR BID.** Completion and submission of the CT Form is required regardless of whether the vendor seeks confidential treatment of information. **Failure to submit a completed CT Form may be cause for disqualification from the solicitation process. If a vendor fails to properly complete and submit the CT Form or otherwise fails to follow CT Form instructions, the response may be publicly disclosed in its entirety without redaction after an award recommendation.**
 - i. Complete and sign Section 1 of the CT Form if the vendor does NOT request confidential treatment of information contained in its response; or
 - ii. Complete and sign Section 2 of the CT Form if the vendor requests confidential treatment of certain information. **Vendor must also submit a "Public Copy" of the response with the trade secret, financial, and proprietary information redacted and clearly labeled as the "Public Copy."**
 - iii. Failure to complete and sign a CT Form may result in disqualification of the vendor. **If a vendor fails to properly complete and submit the CT Form or otherwise fails to follow the CT Form instructions, the response, in its entirety, will be treated as a "Public Copy" and may be publicly disclosed by the State without redaction after vendors have been notified of an award recommendation.**
 - b. **FOIA REQUESTS.** If a FOIA request is made for a vendor's response, the Public Copy may be distributed to the public along with the vendor's CT Form. The CT Form is a public document and serves as an explanation for the redactions to the Public Copy. Do not put any trade secret, financial, or proprietary information in the CT Form. Do not redact the CT Form itself.
 - c. **NO ADVICE.** The State will not advise a vendor as to the nature or content of documents entitled to protection from disclosure under FOIA or other laws, as to the interpretation of such laws, or as to the definition of trade secret or financial or proprietary information. Nothing contained in this provision will modify or amend requirements and obligations imposed on the State by FOIA or other applicable law.
 - d. **FAILURE TO REQUEST CONFIDENTIAL TREATMENT.** Failure to request material be treated as confidential as specified herein relieves the State, its agencies, and personnel from any responsibility for maintaining material in confidence.
 - e. Bids containing a request to maintain an entire response as confidential may be rejected as non-responsive. Vendors may not request confidential treatment with respect to

resumes, pricing, and marketing materials. The State reserves the right to determine whether material designated as exempt by a vendor falls under MCL 18.1261 or other applicable FOIA exemptions. If a FOIA request is made for materials that the vendor has identified as trade secret, financial, or proprietary information, the State has the final authority to determine whether the materials are exempt from disclosure under FOIA.

- f. Vendor forever releases the State, its departments, subdivisions, officers, and employees from all claims, rights, actions, demands, damages, liabilities, expenses and fees, which arise out of or relate to the disclosure of all or a portion of vendor's response submitted under this RFI. Vendor must defend, indemnify and hold the State, its departments, subdivisions, officers, and employees harmless, without limitation, from and against all actions, claims, losses, liabilities, damages, costs, attorney fees, and expenses (including those required to establish the right to indemnification), arising out of or relating to any FOIA request, including potential litigation and appeals, related to the portion of vendor's response submitted under this RFI that vendor has identified as a trade secret, or financial or proprietary information. The State will notify vendor in writing if indemnification is sought. The State is entitled to: (i) regular updates on proceeding status; (ii) participate in the defense of the proceeding; (iii) employ its own counsel; and to (iv) retain control of the defense, or any portion thereof, if the State deems necessary. Vendor will not, without the State's written consent (not to be unreasonably withheld), settle, compromise, or consent to the entry of any judgment in or otherwise seek to terminate any claim, action, or proceeding. If a State employee, official, or law is involved or challenged, the State may control the defense of that portion of the claim. Any litigation activity on behalf of the State, or any of its subdivisions under this Section, must be coordinated with the Department of Attorney General. An attorney designated to represent the State may not do so until approved by the Michigan Attorney General and appointed as a Special Assistant Attorney General.

CONFIDENTIAL TREATMENT FORM

INSTRUCTIONS. Vendor must complete **either** *Section 1* or *Section 2* of this CT Form and sign where indicated. **Do not complete both sections.** This CT Form must be signed by the individual who signed the vendor’s response. A completed CT Form must be submitted with your response, regardless of whether your response contains confidential information.

Failure to submit a completed CT Form with your bid is grounds for rejecting the response as non-responsive. If a vendor fails to properly complete and submit the CT Form or otherwise fails to follow CT Form Instructions, the response, in its entirety, will be treated as a “Public Copy” and may be publicly disclosed by the State without redaction after vendors have been notified of an award recommendation. See the Confidential Treatment Form and The Freedom of Information Act (FOIA) sections of the Response Instructions for additional information.

Section 1. CONFIDENTIAL TREATMENT IS NOT REQUESTED

This section must be completed, signed, and submitted with the response if the vendor does **not** request confidential treatment of any material contained in the response. **If this section is completed, do not complete Section 2. CONFIDENTIAL TREATMENT IS REQUESTED.**

By signing below, the vendor affirms that confidential treatment of material contained in their response is not requested.

| | | | |
|------------|--|-----------|--|
| RFI Number | | RFI Title | |
| Signature | | Date | |

Printed Name, Title, Company

Section 2. CONFIDENTIAL TREATMENT IS REQUESTED

This section must be completed, signed, and submitted with the response if vendor requests confidential treatment of any material contained in the response. Submission of a completed CT Form is required to request confidential treatment. **If this section is completed, do not complete Section 1. CONFIDENTIAL TREATMENT IS NOT REQUESTED.**

Provide the information in the table below. Vendor may add rows or additional pages using the same format shown in the table. Vendor must specifically identify the information to be protected as confidential and state the reasons why protection is necessary.

The CT Form will not be considered fully complete unless, for each confidentiality request, the vendor: (1) identifies the Response Page #, Section #, and Paragraph #, (2) identifies whether the material is a Trade Secret (TS), Proprietary Financial Information (FI), or Proprietary Information (PI), and (3) explains the specific legal grounds that support treatment of the material as TS, FI, or PI. Vendors must provide a complete justification as to how the material falls within the scope of an applicable FOIA exemption or relevant case law. Vendors must not simply cite to an applicable exemption or case name. Vendors must also provide the contact information for the person at their organization authorized to respond to inquiries by the State concerning the material.

Vendor must also submit a “Public Copy” of the response with the trade secret, financial, and proprietary information redacted and clearly labeled as the “Public Copy”.

| (1) Response Page #, Section #, Paragraph # | (2) Material is Trade Secret (TS), Proprietary Financial Information (FI), Proprietary Information (PI) | (3) Applicable FOIA Exemption with Written Justification | (4) Vendor Contact Information |
|--|--|---|-----------------------------------|
| | | | |

By signing below, the vendor affirms that confidential treatment of material contained in their response is requested and has attached to this form a redacted “Public Copy” of the vendor’s response.

RFI Number _____ RFI Title _____

Signature _____ Date _____

Printed Name, Title, Company

REQUEST FOR INFORMATION

MI Home Energy Rebate Program & Aggregators

The purpose for this Request for Information (RFI) includes, but is not limited to, collecting market information to better understand best practices about the capabilities, experience, methodologies, and innovative approaches of potential aggregators for the Federal Department of Energy's Home Efficiency Rebate program under the Inflation Reduction Act (IRA) Section 50121, specifically focusing on the measured approach to achieving whole-house energy savings that will be implemented in Michigan. The information gathered may be used to assist the State in developing program strategy and possibly developing a RFP.

1. Program Overview

The State of Michigan is implementing programs that were enacted by the IRA, including the Home Efficiency Rebates (HER) Program (IRA Section 50121), which provides rebates for whole-home energy savings upgrades to single-family and multifamily households. The program is administered federally by the U.S. Department of Energy (DOE). Michigan will consider both measured and modeled pathways to estimate energy savings within the HER Program.

This RFI is focused specifically on the Measured approach for the 50121.

Measured Home Efficiency Rebates is a program path within Section 50121, using a DOE-approved open-source measurement and verification (M&V) methodology to measure home energy savings post-installation of the upgrades, providing rebates for homes or a portfolio of homes that achieve measured energy savings of at least 15%.

An aggregator is defined by the DOE IRA-funded energy rebates programs as “an entity that completes home upgrade projects across a portfolio of homes to receive rebates. Aggregators must be pre-approved by the State. An example might be a contractor, project developer, energy consultant, or energy technology company.” The aggregator must comply with all program requirements. If aggregators are providing rebates based on estimated savings, the risk of recovering costs based on actual reported savings must be borne by the aggregator.

2. Respondent Contact Information

- a. Please provide complete contact information, including name, organization type, physical headquarters address, email address and phone number. Please also identify principal point of contact.

3. State Approval

- a. Please identify the states in which your organization has been approved or has a pending request to operate as an aggregator for the IRA HER Energy Rebate Program.
- b. Please identify any states to which your organization applied for approval to operate as an aggregator but was declined.

4. Roles and Expectations

- a. Please describe your organization's perspective on the roles and expectations of aggregators for the support of the IRA Energy Rebate programs.
 - b. Provide proposed logic models and/or process maps that further details your organization's roles.
 - c. Please describe your goals and objectives for participating in the MI HER program.
 - d. Explain how your business model and involvement will add-value to the state, homeowners and contractors.
 - e. The state of Michigan may consider requiring a signed Program Participation Agreement prior to project enrollment. Please explain the processes and agreements that has worked for your organization in the past.
- 5. Financing**
- a. Will your organization require a partnership with one or more financing entities to finance rebate payments? If so, has your organization already established financing partnerships, including but not limited to financing entities located in the State of Michigan?
 - b. Please describe the types of financing partners aggregators would seek to form partnerships to fund rebates.
- 6. Contractor Engagement**
- a. Please describe how your organization will recruit qualified contractors for the HER program.
 - b. How will your organization plan on sharing rebate/revenue with contractors?
 - c. What criteria would your organization utilize to qualify contractors for the program?
 - d. How would your organization ensure that the criteria aligns with US DOE requirements and Michigan's program goals?
- 7. Marketing and Outreach**
- a. Please describe the types of dwellings and regions in Michigan that your organization would prefer to target for the HER rebate program.
 - b. How does your organization plan on serving multi-family buildings using the measured approach?
 - c. How would your organization plan to engage with residential homeowners and renters?
 - d. Are there any regions within the State of Michigan that your organization would not be willing to participate to support the HER rebate program?
- 8. Application Eligibility and Project Submission Process**
- a. Please describe how your organization would handle participant and project eligibility for both measured and modeled pathways.
 - b. Please describe your approach to project enrollment submissions and approval process.

9. Rebate Payments

- a. Please describe your organization's approach to rebate payments for the measured and modeled pathways.
- b. To the extent that your organization would use upfront payments, please describe specifically how measured and modeled upfront payments would be calculated and made.
- c. Please provide contemplated rebate payment flows for measured and modeled payments.
- d. How would your organization ensure the availability of rebate funds for eligible projects across the state?
- e. Please describe the rebate invoicing process your organization would use for processing HER program rebates.

10. Consumer Protection and QA/QC

- a. Please describe how your organization would work with EGLE's selected implementer to implement HER program requirements, generally.
- b. How would your organization support the implementation of the consumer protection plan?
- c. Please describe how your organization would manage customer complaints and contractor issues that arise during the HER program's implementation.
- d. How would your organization work to ensure access of energy use data (including delivered fuels) covering 12-months of pre-install and 12-months of post-install period?
- e. Please describe how your organization would support homeowner income verification.

11. Energy Data Collection

- a. Please describe how your organization would approach the collection of comprehensive energy use data from consumers.
- b. How will your organization ensure the protection and appropriate program use of the energy data you collect?

12. Measurement and Verification

- a. How will measurement and verification be handled?
- b. What type of reporting will be provided?