

Justin S. Greene
Commissioner, District 1

Anna Hansen
Commissioner, District 2

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Commissioner, District 3



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Commissioner, District 4

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Commissioner, District 5

Gregory S. Shaffer
County Manager

September 30, 2024

SANTA FE COUNTY
RFP No. 2025-0055-CDD/TJ
HOME REHABILITATION ENERGY EFFICIENCY PROGRAM
ADMINISTRATIVE SERVICES

ADDENDUM NO. 1

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

Attachment A: Pre-Proposal Agenda and Sign-In Sheet

Question No. 1: Page 5, section B, first paragraph: can qualified, community-based organizations apply to administer ONLY ONE of the proposed programs?

Answer No. 1: While the specific interventions detailed within the HREE and CEED programs differ both programs cover the same target population and require the same initial actions to include household eligibility and application assessment, participant ranking and prioritization, home assessments and development of household level scopes of work. Due to the above-mentioned overlap in program activities selecting a single applicant to administer both programs allows for operational efficiencies and is advantageous to the County. As further detailed in response to question 4, the same client has the potential to receive both CEED and HREE funding. As a result, community-based organizations are not permitted to administer only one of the proposed programs.

Question No. 2: Page 7, section B-4: What is the purpose of defining the number of homes that receive specific improvements? Our concern is that we can't anticipate now what improvements further clients might need, and that is the overly restrictive.

- a. Since many of the HER and HEAR rebates will be deployed via retailers at point of sale, how will this align with the deployment of CEED grant funds?
- b. Can a qualified, approved lender acting as the Program Administrator authorize the award or denial of program funding instead of the County?

Answer No. 2:

As described within the RFP, improvement specific targets are only relevant to the CEED program. HREE improvements are intended to be selected based on home assessment findings and should be tailored to the remediation needs of individual households.

The CEED program is funded by a \$835,000 grant through the EMNRD Energy Conservation and Management Division. In developing the grant application, Santa Fe County was required to estimate the energy, cost and GHG savings of interventions at the household level. To facilitate accurate estimations specific improvements were grouped into 3 categories in alignment with the NREL Restock Analysis Tool: envelope improvements (to include 2021 IECC Air Sealing, Energy Star Window and Door Replacement, 2021 IECC Drill-and-fill wall cavity insulation, 2021 IECC required insulation, Duct sealing & insulating), HVAC upgrades (to include High Efficiency Heat Pump Retrofit, Smart Thermostat Installation and Heat Pump Water Heaters) and solar installation.

CEED interventions are intended to be primarily guided by the findings of completed home energy audits and specific improvements can differ from those outlined above. The household targets described in B.4 are intended to help inform the scope and cost of recommended interventions. It is intended that all 41 participating households receive some level of energy efficiency improvements while a smaller subset is selected for more extensive improvements at a higher cost based on energy audit findings. For example, households on propane which have an ageing HVAC system may be good candidates for HVAC improvements. In summary, improvement specific targets are intended to inform intervention selection however the program administrator has the ability to select specific target actions based on household need. See Table 1 for more information regarding anticipated project costs by efficiency measure.

<i>Energy Efficiency Measure</i>	<i>Average Cost per Participating Household (without rebates)</i>	<i>Average Cost per Participating Household (with rebates)</i>
Envelope Improvements	\$13,000	\$11,400
HVAC Upgrades	\$31,847	\$22,097
PV Installation	\$22,338	\$18,188

- a. HER and HEAR rebates were incorporated into the total CEED budget extending the number of households which can participate in the program. It is expected that all CEED program households will take advantage of HER and/or HEAR rebates. As a result, participating CEED contractors

must be registered and approved by the state to participate in the rebate program. In administering the State CEED program the Energy Conservation and Management Division will work closely with Santa Fe County to ensure participating residents can take advantage of HER and HEAR rebates (potentially at a time before the program is fully available to the public.) Additional efforts will be made to fully understand this process however it is expected that Santa Fe County staff will work closely with the program administrator to ensure participating households apply through the Energy Conservation and Management Portal and receive a rebate voucher to be presented to the selected contractor or service provider.

b. Yes

Question No. 3: Page 8, section B.5: Will there be a mechanism to add or remove contractors to the program based upon need and customer feedback?

Answer No. 3: Contractors can be added or removed from the program with County approval.

Question No. 4: Page 8, section B-6: What is the value of the County recording the Affordable Mortgage versus the Program Administrator?

- a. Who will manage the contractors should there be noncompliance with scope of work or other issues related to scope of work?
- b. Can the same client receive both CEED and HREE funds?
- c. Is the Program Administrator responsible for fronting costs in advance of final completion? Many contractors will not or cannot begin work without an upfront payment of some percentage of the overall project cost.
- d. In the pre-planning conference, the Community Development representative stated that an Affordable Mortgage and Affordability agreement would not be required for CEED funding. In that case, can CEED grand fund be passed through and administered by the program administrator?

Answer No. 4: The County is not opposed to the Program Administrator recording the Affordable Mortgage as long as a project packet is not deemed complete until the mortgage has been recorded and a copy of the recorded mortgage has been placed in file.

- a. Contractor management is the primary responsibility of the program administrator however County staff will be available to help navigate contractor issues.
- b. Yes
- c. In accordance with Santa Fe County procurement procedures both program work and administrative expenses will be paid on a reimbursement basis. Despite this, the County anticipates the potential to issue a single purchase order to the selected program administrator covering all program costs within the reporting year (in excess of \$1,000,000.) This purchase order can be used to pay contractor “up front” expenses and it is not expected that the Program Administrator will need to front costs in advance of project completion.

Santa Fe County staff will make all efforts necessary to ensure the payment process does adversely impact the timely completion of project activities, the payment of contractors or the payment of the program administrator for administration services rendered. County staff are open to additional applicant suggestions regarding how best to streamline the reimbursement process and provide the program administrator with sufficient agency to effectively and efficiently administer the program.

d. Yes, the applicant will however, be required to qualify for AMI criteria.

Question No. 5: Page 9: What's the difference between the Home Assessment and Home Energy Audit reports?

Answer No. 5: Home Assessment reports are intended to document current household conditions, facilitate household ranking/prioritization and inform the development of household level scopes of work. Home assessment findings will be used to determine if participants are eligible for additional energy efficiency funding through the CEED program.

Home Energy Audits are only applicable to CEED program participants and are intended to only inform the selection of energy efficiency improvements. Home energy audits will be used to establish baseline energy use and estimate the energy use/cost savings of recommended improvements. Following project completion, a second energy audit will be conducted to confirm energy use/cost savings targets have been met.

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, hereto as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to Tammy Jim, Procurement Specialist Senior at tjim@santafecountynm.gov.



PRE-PROPOSAL CONFERENCE
RFP No. 2025-0055-CDD/TJ
HOME REHABILITATION AND ENERGY EFFICIENCY PROGRAM
ADMINISTRATIVE SERVICES
SEPTEMBER 17, 2024 AT 3:00 PM

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
Tammy Jim	SFC Purchasing Dept	505-986-6370	tjim@santafecountynm.gov
Sarah Rulfs	Homewise	505-602-3010	SRulfs@homewise.org
Jacqueline Beam	SFC Community Development Dept	505-992-9832	jybeam@santafecountynm.gov
Estrella Martinez	SFC Housing Dept	505-86-2427	efmartinez@santafecountynm.gov
Jordan Barela	SFC Housing Dept	505-992-3051	jjbarela@santafecountynm.gov
Denise Benavidez	SFC Community Development Dept	505-986-6264	debenavidez@santafecountynm.gov
Paul Olafson	SFC Community Development Dept	505-992-9847	POlafson@santafecountynm.gov
Isaac Hammond-Paul	Homewise	505-602-3010	IHammondPaul@homecoming.org



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RFP No. 2025-0055-CDD/TJ
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ADMINISTRATIVE SERVICES
SEPTEMBER 17, 2024 AT 3:00 PM

Contracting Agency: Santa Fe County

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|----------------------------|-------------------------------|-----------------------|
| • Tammy Jim | Procurement Specialist Senior | Purchasing Division |
| • Amanda Patterson-Sanchez | Procurement Planner Analyst | Purchasing Division |
| • Jacqueline Beam | Sustainability Manager | Community Development |

Project Information

Santa Fe County Community Development Department is requesting proposals from qualified Offerors to provide community-based organizations to administer two programs providing home rehabilitation and energy efficiency improvements for low to moderate income County residents.

Proposal Information

- Carefully read the Request for Proposal for requirements, terms & conditions including the sample contract.
- Sequence of Events are listed on page 13.
- Proposal Organization – Proposal should be organized as outlined in the RFP on page 24-25.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 29-30) will be scored by a three to four-member evaluation committee.
- Preferences -

1) N.M. In-State Business Preference Certificate 50 points total of all evaluation factors added to score.

OR

2) N.M. Resident Veterans Preference Certificate, 100 points total of all evaluation factors added to score or Native American Preference. For more information on State Preference visit www.tax.newmexico.gov

AND

3) Santa Fe County Preference, 50 points total of all evaluation factors added to score. For more information on County Preference visit <https://www.santafecountynm.gov/finance/purchasing-division>

- Please submit all questions via email to Tammy Jim at tjim@santafecountynm.gov. The last day for questions will be **Friday, September 20, 2024**. *(Any contact with any other County staff member or persons other than the Procurement Specialist Senior may be grounds for disqualification.)*
- Addendum will be issued on **Wednesday, September 25, 2024**. *(Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.)*
- Proposal Submittal –

Due Date: Wednesday, October 16, 2024

Time: 2:00 PM

Location: 102 Grant Avenue 1st Floor, Santa Fe, NM

**Electronic submission also available via Dropbox utilizing
Dropbox link:**

<https://www.dropbox.com/request/yAVAvCv7LiLN7QftQYFp>