

**GOVERNMENT OF  
THE VIRGIN ISLANDS OF THE UNITED STATES**

**Request for Proposal – Negotiation  
Professional Services**

To: .....

Date: January 21, 2026

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RFP No. BD-26-270-2701-635

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Pursuant to 31 V.I.C. 236 (j) and Rules and Regulations thereunder issued, the Government of the Virgin Islands, hereinafter referred to as GVI, Department of Property and Procurement, shall receive proposals for the work described below. Proposals shall be received no later than **Thursday, February 19, 2026, at 4:30 p.m.** Atlantic Standard Time.

**DESCRIPTION OF WORK:**

This Scope of Services (SOS) is to assist the Virgin Islands Energy Office with the planning, developing, and implementation strategy for the Virgin Islands Energy Office Homes & Hear Programs to advance energy efficiency in the United States Virgin Islands.

Period of Performance: The contract shall commence upon execution by the Commissioner of the Department of Property and Procurement and shall remains effective for three (3) years, unless earlier terminated in accordance with the provisions herein.

See Scope of Work attached for additional information.

**NEGOTIATED PROCEDURES:**

The Commissioner of the Department of Property and Procurement will appoint a Selection Committee to assist in the evaluation and selection of the Contractor. Accordingly, proposals shall be reviewed and rated on the selection criteria outlined in the **“Factors For Discussions.”** After reviewing and rating the proposals, the Committee will select for discussions from the firm/s or person/s **deemed to be the most highly qualified to provide the services herein required.** Discussions will be conducted with the firm or person so selected. The Committee may select to conduct discussions and/or oral presentations from the firm/s or person/s, not less than two (2) deemed to be the most highly qualified.

## **FACTORS FOR DISCUSSIONS:**

Selection criteria will include **(i)** Professional qualification, registration, and general reputation of principals of the firm or person; **(ii)** the extent to which the firm or person specializes in or has provided services of a type and scope similar to the hereunder; **(iii)** familiarity with the location (s) in which services will be performed; **(iv)** project approach and capability of meeting schedules; and **(v)** quality of performance on other similar projects. Proposals will be **evaluated and rated** according to the following criteria in descending order: (a) Project Approach (b) Qualifications (c) Experience (d) References and (e) Cost. The Selection Committee may, at its option, request any or all proposers to participate in on-site or virtual interviews. Note to Staff: Factors may change depending on project/ agency needs etc.

## **NEGOTIATION:**

The Selection Committee shall recommend to the Commissioner **the highest qualified firm or person with whom a contract shall be negotiated as a result of the Committee's scores from the written proposals or discussions-oral presentations if conducted.** The Commissioner, with the assistance of the Selection Committee, shall attempt to negotiate a contract with such firm or person.

Should the Commissioner be unable to negotiate a satisfactory contract with the firm considered to be the most qualified, at a price, he determines to be fair and reasonable to the Government, negotiations with that firm will be formally terminated. Negotiations will then commence with the second most qualified, the third most qualified, or additional firms, in order of preference, and shall continue until an agreement is reached.

Lisa M. Alejandro  
Commissioner  
Property and Procurement

## INSTRUCTION TO PROPOSERS

### A. NOTICE

#### **BD-26-270-2701-635 - Development of an implementation strategy for the HOMES and HEAR Program**

Information provided in the scope of work is to be used only for purposes of preparing a proposal. It is further expected that each proposer will read the scope of work thoroughly, for failure to meet certain specified conditions may invalidate the proposal.

The Government of the Virgin Islands, herein after referred to as GVI, reserves the right to reject any or all proposals or any portion thereof and to accept the proposal deemed most advantageous to GVI. The **price** shall not be the sole criterion of awarding this project. Scope and quality of work proposed and the ability of the proposer to complete this type of project shall also be considered.

Proposers are requested to submit proposals on the basis of the scope of work. Alternative proposals recommending new features and technology other than that requested in the scope of work will receive consideration providing such new features and/or technology is clearly explained. Any exceptions to the requirements requested herein must be clearly noted in writing and be included as part of the proposal.

**Request for Information:** The information contained herein is believed to be accurate but is not to be considered in any way as a warranty. Request for additional information clarifying the Scope of Services should be directed in writing and submitted on the **Q&A tab of the solicitation in GVIBUY** via your GVIBUY vendor account accessed through the following link: <https://gvibuy.buyspeed.com/bso/>. Last day for request for written clarification will be **February 2, 2026, at 12:00 noon Atlantic Standard Time**.

### B. STATEMENT OF PURPOSE

To assist the Government of the Virgin Islands in meeting the requirement for the following services: **BD-26-270-2701-635 – Development of an implementation strategy for the HOMES and HEAR Program**

### C. PROPOSED SCOPE OF WORK

To assist the Virgin Islands Energy Office with the planning, developing, and implementation strategy for the Virgin Islands Energy Office Homes & Hear Programs to advance energy efficiency in the United States Virgin Islands.

See Scope of Work attached for additional information.

## **D. TIMETABLE**

**Last Day for Written Clarification is Monday, February 2, 2026, at 12:00 noon**  
Atlantic Standard Time.

## **E. SUBMISSION OF PROPOSAL**

All interested parties shall submit **one (1)** electronic copy of proposals, which are to be delivered to the Department of Property and Procurement via the vendor's GVIBUY account no later than **Thursday, February 19, 2026 at 4:30 p.m.** Atlantic Standard Time accessed through the following link: <https://gvibuy.buyspeed.com/bso/>.

Proposers should review and validate their quotes for accuracy before pressing the “**Submit Quote**” tab. The Summary tab at the top of the screen is where proposers will review the information entered on their quote and submit to the Government, Department of Property and Procurement. Once the Bid Open Date has been reached, the Government, Department of Property and Procurement will open and review all quotes received. Quotes must be submitted in advance of the Open Bid Date. Any quote not submitted by the Open Bid Date is considered unsubmitted and **will not** be considered for evaluation. To submit the quote, follow steps 1 through 4 below.

1. Review the information and ensure all of the submitted data is correct. If there are errors, Quotes can be withdrawn and resubmitted, but it is good practice to ensure Quotes are comprehensive before submitting.
2. Once all information has been validated, scroll to the bottom of the screen and click **Submit**.
3. A popup appears asking if you want to submit the Quote. Click **OK** to confirm.
4. The screen refreshes. Your quote is now submitted.

**Note:** Quotes may be withdrawn by clicking the **Withdraw Quote** button on the same screen.

## **F. WITHDRAWALS OF PROPOSAL**

A proposal may be withdrawn at any time prior to the time specified as the closing time for acceptance of proposals. However, no proposal shall be withdrawn or canceled for a period of thirty (30) days after said closing time for acceptance of proposals, nor shall the successful provider withdraw, cancel or modify the proposal, except at the request of GVI after having been notified that GVI has accepted proposal.

## **G. INTERPRETATION OF SPECIFICATIONS**

If any person contemplating submitting a proposal requires clarification of any part of the scope of work, he/she may submit to the GVI a written request for an interpretation thereof via the **Q&A tab of the solicitation in GVIBUY**. GVI will not respond to questions received after the above established date. The person submitting the request will be

responsible for its prompt delivery. Any interpretation of the scope of work will be made in writing to all prospective providers. Oral explanations will not be binding.

## **H. CONSIDERATION OF PROPOSAL**

The Commissioner of Property and Procurement shall represent and act for GVI in all matters pertaining to the scope of work and contract in conjunction therewith. **This RFP does not commit GVI to the award of a contract or pay of any cost incurred in preparing and submitting proposals in anticipation of a contract. GVI reserves the right to reject any or all proposals and to disregard any informality and/or irregularity in the proposal when, in its opinion, the best interest of GVI will be served by such action.** Proposals failing to provide some of the items in the scope of work shall not be rejected per se, but any deviations from the scope must be clearly noted.

## **I. ACCEPTANCE OF PROPOSALS**

GVI will notify in writing acceptance of one of the proposals. Failure to provide any supplementary documentation to comply with the respondent's proposal may be grounds for disqualification.

## **J. CONTENTS OF PROPOSAL**

The following is a list of information to be included in the written proposal. The documents listed under this section are required for submission of a proposal in response to this RFP. Current Documents may be uploaded in the vendor's GVIBUY profile and, once current, do NOT need to be resubmitted. Failure to comply with any requirement as outlined will adversely affect proposer(s) rating score.

1. Organization:
  - a. Introductory letter about the respondent:
    - i. Name, address, email, and telephone numbers.
    - ii. Type of service for which individual/firm is qualified.
  - b. Provide a list of staff available for the project (Local & Off-Territory) to include key personnel, an organization chart and expertise of staff/personnel
  - c. Current Business License or state register for the services being advertised. All proposers bidding as a Joint Venture must be licensed as a Joint Venture in the US Virgin Islands
  - d. Current trade name registration certification; if applicable
  - e. Certificate of Good Standing dated July 1, 2025, or later
  - f. Articles of Incorporation (For Corporations) or Articles of Organization for (LLC's) or Statement of Qualification (Limited Partnerships), if applicable.
  - g. Corporate Resolution or equivalent identifying the person who is authorized to act for the respondent with respect to this RFP.
2. Sub-Contractors(If you are not utilizing a subcontractor, please state that within your proposal):

- a. Provide listing of Sub-Contractors that shall be retained for this project including phone numbers.
- b. Provide what percentage of work will be sub-contracted.

3. Project Experience:
  - a. Provide a list of projects performed within the last three (3) years. Include a brief description of the work performed and cost of each project.
  - b. Provide a list of projects currently being performed. Include a brief description of the project and percentage completed.
4. Project Approach:
  - a. The respondent applying to this solicitation will describe how you will approach this project and availability to perform the services requested.
5. References Letters: 3 letters minimum related to the projected being solicited. To obtain maximum allotted points, each letter must:
  - a. Include information about past performance on similar project from authorized representative; and
  - b. Include a working telephone number; and email address to be contacted
6. Proof of Sam.Gov registration that reflects the expiration date.
7. **Cost Proposal *must* be included in proposer's proposal. Provide a detailed breakdown of total cost within the period of performance.**

## **K. CONFLICT OF INTEREST**

A proposer filing a proposal hereby certifies that no officer, agent, or employee of GVI has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of GVI; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same request for proposals; the respondent, is competing solely on its own behalf without connection with, or obligation to, any undisclosed person or firm.

## **L. ACCEPTANCE OF CONTRACT TEMPLATE AND OTHER TERMS AND CONDITIONS**

By submitting a proposal in response to this RFP, the respondent agrees to accept the boilerplate terms and conditions of the Government's standard Professional Services Contract, a copy of which is attached to this RFP, if the respondent is selected for award.

## **M. BID PROTESTS**

The Contracting Officer shall consider all protests or objections to the award of a contract, within ten (10) calendar days after receipt of a notice of award/non-award. Protest(s) of award shall be submitted in writing to the Contracting Officer and shall be handled in a

manner to be determined by the circumstances. The Contracting Officer will provide a written response to each protest received within the time allotted for receipt of protests. Protests must be addressed to the Commissioner of Property and Procurement in writing and submitted to: [debrief\\_protest@dpp.vi.gov](mailto:debrief_protest@dpp.vi.gov).

## **N. DEBRIEFING**

The Government shall provide written notice to all offerors advising them of the selection or non-selection of their bid. Debriefings may be performed orally, or in writing upon written request received by an offeror within three (3) days of the Government's notification about the outcome of the solicitation. An offeror that was notified of exclusion from the competition, that fails to submit a timely request, is not entitled to a debriefing. The Government shall establish the time when the debriefing shall occur and will be carried out in the manner requested by the offeror and allowed by the Government. At a minimum, the debriefing information shall include: (1) The Government's evaluation of the offeror's bid/proposal; (2) offeror's cost or price (including unit prices) and technical rating, if applicable of the successful offeror and debriefed offeror, and past performance information on the debriefed offeror; (3) Summary of the rationale for award and (4) Reasonable responses to debriefers responsiveness and responsibility. The debriefings shall not include point-by-point comparison of the debriefed offeror's bid/proposal with those of other offerors and shall not reveal any information prohibited by disclosure such as: (i) Trade secrets; (ii) privileged or confidential manufacturing processes and techniques; (iii) commercial and financial information that is privileged or confidential, including cost breakdowns, profit, indirect cost rates, and similar information; and (iv) the names of individuals providing reference information about an offeror's past performance. Requests for debriefing must be addressed to the Commissioner of Property and Procurement in writing and submitted to: [debrief\\_protest@dpp.vi.gov](mailto:debrief_protest@dpp.vi.gov).

## **O. MANDATORY LIST OF REQUIRED SUPPORTING DOCUMENTS TO CONTRACT WITH GOVERNMENT OF THE VIRGIN ISLANDS**

1. See Attached.

THE DOCUMENTS IN THE ATTACHMENT WILL BE REQUIRED FOR APPROVAL OF THE CONTRACT WITH THE SUCCESSFUL RESPONDENT.

[mandatory list of required supporting documents to contract with government of the virgin islands 19.pdf](#)



# Government of the United States Virgin Islands

## VIRGIN ISLANDS ENERGY OFFICE

#2 ESTATE CARLTON | SUITE 3, FREDERIKSTED, VI 00840 | PHONE: 340.713.8436 | FAX: 340.772.0083  
4605 TUTU PARK MALL #231, ST. THOMAS, VI 00802 | PHONE: 340.714.8436 | FAX: 340.776.1914  
EMAIL: [ADAM.FAY@EO.VI.GOV](mailto:ADAM.FAY@EO.VI.GOV)



OFFICE OF THE ENERGY EFFICIENCY PROGRAM DIRECTOR

FAX: 340.772.2133

## SCOPE OF WORK

### REQUEST FOR PROPOSAL (RFP)

**BLUEPRINT COMPLETION, PROGRAM DESIGN, CRM SYSTEM, IMPLEMENTATION AND MANAGEMENT LEADER FOR THE HOMES, HEAR (IRA 50121 AND 50122)**

ISSUED BY: VIRGIN ISLANDS ENERGY OFFICE (VIEO)

### 1. INTRODUCTION

THE VIRGIN ISLANDS ENERGY OFFICE (VIEO) INVITES QUALIFIED FIRMS TO SUBMIT PROPOSALS TO PROVIDE PROGRAM BLUEPRINT ASSISTANCE, PROGRAM DESIGN SUPPORT, AND IMPLEMENTATION MANAGEMENT FOR THE U.S. VIRGIN ISLANDS' INFLATION REDUCTION ACT (IRA) **SECTION 50121 (HOME OWNERS MANAGEMENT ENERGY SAVINGS – HOMES)** AND **SECTION 50122 (HOME ELECTRIFICATION AND APPLIANCE REBATES – HEAR)** PROGRAMS.

ONE PURPOSE OF THIS REQUEST FOR PROPOSALS (RFP) IS TO OBTAIN EXPERT SUPPORT TO **DRAFT, REFINE, AND FINALIZE ALL REQUIRED PROGRAM BLUEPRINT DOCUMENTS**, ENSURE FULL ALIGNMENT WITH U.S. DEPARTMENT OF ENERGY (DOE) REQUIREMENTS, AND SUPPORT VIEO IN ACHIEVING "**APPROVED TO LAUNCH**" STATUS FOR BOTH PROGRAMS. VIEO IS SEEKING A CONTRACTOR OR TEAM OF CONTRACTORS WITH DEMONSTRATED EXPERIENCE IN DOE-FUNDED RESIDENTIAL ENERGY EFFICIENCY AND ELECTRIFICATION PROGRAMS, CONSUMER PROTECTION FRAMEWORKS, AND PROGRAM LAUNCH READINESS.

VIEO IS LOOKING FOR A FIRM OR FIRMS THAT CAN DESIGN, DEVELOP, IMPLEMENT, AND PROVIDE ONGOING SUPPORT OF A COMPREHENSIVE **CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM AND ONLINE PORTAL**. DUE TO THE SMALL SIZE OF THE VIEO, IT WOULD PREFER A COMPANY THAT CAN SUPPORT A MAJOR PORTION OF THE EFFORT NEEDED TO DESIGN, LAUNCH, IMPLEMENT, AND MANAGE BOTH 50121 AND 50122 PROGRAMS. IN ADDITION TO THE CRM SYSTEM AND ONLINE APPLICATION PORTAL, THE VIEO IS REQUESTING SUPPORT FOR PROGRAM DESIGN, IMPLEMENTATION, AND BLUEPRINT ASSISTANCE. THE INFRASTRUCTURE AND ONLINE SYSTEM SHALL BE ADAPTABLE / COMPATIBLE TO SUPPORT FUTURE WEATHERIZATION ASSISTANCE PROGRAM (WAP) INITIATIVES.

THIS SOLICITATION IS **INTENDED TO PROCURE A FULL PROGRAM IMPLEMENTER** FOR LONG-TERM PROGRAM ADMINISTRATION, REBATE PROCESSING, CONTRACTOR MANAGEMENT, OR ONGOING OPERATIONS. AS THE IMPLEMENTATION LEADER THE SELECTED VENDOR SHALL IMPLEMENT AND MANAGE THE CONTRACTORS, CUSTOMERS, OUTREACH AND FEDERAL REPORTING TO THE LEVEL NECESSARY TO SUPPORT VIEO, OR A SEPARATE IMPLEMENTER, IN EXECUTING THE PROGRAMS AS DESIGNED, IDENTIFYING EARLY OPERATIONAL RISKS, AND MAKING DOE-COMPLIANT ADJUSTMENTS.

THE SELECTED VENDOR WILL MANAGE THE **HOME OWNERS MANAGEMENT ENERGY SAVINGS (HOMES)**, **HOME ELECTRIFICATION AND APPLIANCE REBATES (HEAR)**, AND INITIATIVES FUNDED UNDER THE **INFLATION REDUCTION ACT (IRA)** AND OTHER FEDERAL OR TERRITORIAL ENERGY PROGRAMS. THE PLATFORM WILL SERVE RESIDENTS OF **ST. CROIX, ST. THOMAS, AND ST. JOHN**, PROVIDING A UNIFIED APPLICATION AND MANAGEMENT SYSTEM FOR CONSUMER REBATES, CONTRACTOR PARTICIPATION, AND FEDERAL DATA REPORTING THROUGH DOE'S **PACIFIC NORTHWEST NATIONAL LABORATORY (PNNL) API**.

**FUTURE USE AND EXPANSION OF CONTRACT** - VIEO INTENDS FOR THE CRM SYSTEM AND RELATED IMPLEMENTATION SERVICES ESTABLISHED UNDER ANY CONTRACT RESULTING FROM THIS RFP TO SERVE AS A FOUNDATIONAL PLATFORM FOR CURRENT AND FUTURE ENERGY-EFFICIENCY, ELECTRIFICATION, RESILIENCE, AND RELATED PROGRAMS ADMINISTERED BY THE VIRGIN ISLANDS ENERGY OFFICE. SUBJECT TO THE AVAILABILITY OF FUNDS AND MUTUAL AGREEMENT OF THE PARTIES, VIEO MAY UTILIZE THIS CONTRACT TO ADD ADDITIONAL TASKS, TASK ORDERS, OR PROGRAM MODULES (INCLUDING OTHER FEDERAL OR TERRITORIAL ENERGY PROGRAMS) THAT ARE WITHIN THE GENERAL SCOPE OF THIS SOLICITATION, WITHOUT REQUIRING A SEPARATE COMPETITIVE PROCUREMENT.

### 2. PROJECT OBJECTIVES

VIEO IS SEEKING A CONTRACTOR OR CONTRACTORS TO ASSIST IN THREE DISTINCT, BUT SIGNIFICANTLY RELATED TASKS. THE SELECTED OFFEROR MAY MEET THESE REQUIREMENTS THROUGH ITS OWN STAFF OR THROUGH SUBCONTRACTORS UNDER ITS MANAGEMENT, PROVIDED ROLES AND RESPONSIBILITIES ARE CLEARLY DEFINED

#### A. VENDOR SHALL BE RESPONSIBLE FOR Blueprint Completion with DOE "APPROVED TO LAUNCH" STATUS



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- DRAFT, REVISE, AND/OR PROVIDE FEEDBACK ON BLUEPRINT TO LAUNCH DOCUMENTS FOR IRA 50121 (HOMES)
  - COMMUNITY BENEFITS PLAN
  - CONSUMER BILL OF RIGHTS
  - CONSUMER PROTECTION PLAN
  - DATA ACCESS PLAN
  - EDUCATION & OUTREACH PLAN
  - PRIVACY, SECURITY & RISK PLAN
  - MARKET TRANSFORMATION PLAN
- DRAFT, REVISE, AND/OR PROVIDE FEEDBACK ON BLUEPRINT TO LAUNCH DOCUMENTS FOR IRA 50122 (HEAR)
  - COMMUNITY BENEFITS PLAN
  - CONSUMER BILL OF RIGHTS
  - CONSUMER PROTECTION PLAN
  - EDUCATION & OUTREACH PLAN
  - PRIVACY, SECURITY & RISK PLAN
  - MARKET TRANSFORMATION PLAN

### B. THE CRM SYSTEM MUST:

- PROVIDE A **CENTRALIZED DIGITAL PLATFORM** TO MANAGE HOMES, HEAR, AND WAP PROGRAMS.
- ALLOW RESIDENTS, CONTRACTORS, AND RETAILERS TO **APPLY, DETERMINE ELIGIBILITY, AND RECEIVE REBATES** FOR QUALIFIED ENERGY EFFICIENCY MEASURES.
- SUPPORT **COUPON-BASED REBATES, CONTRACTOR AND RETAILER INCENTIVES, AND DIY/SELF-INSTALL REBATE PATHS**.
- INTEGRATE SEAMLESSLY WITH DOE'S **PNNL API** FOR REAL-TIME DATA EXCHANGE.
- SUPPORT **WAP (WEATHERIZATION ASSISTANCE PROGRAM)** CAPABILITIES FOR COMPREHENSIVE ENERGY EFFICIENCY UPGRADES AND LOW-INCOME HOUSEHOLD SUPPORT.
- MANAGE THE **CONTRACTOR AND RETAILER PARTICIPATION PROCESS**, MAINTAINING APPROVED LISTS AND ENSURING COMPLIANCE.
- PROVIDE TOOLS FOR **MOBILE FIELD VERIFICATION, PHOTO DOCUMENTATION, AUDITING, AND PAYMENT MANAGEMENT**.

### C. PROGRAM DESIGN, IMPLEMENTATION, AND MANAGEMENT

- SELECTED CONTRACTOR WILL ASSIST VIEO IN IDENTIFYING AND DEVELOPING THE OPERATIONAL MECHANISMS AND BUSINESS PROCESSES NECESSARY FOR EFFICIENT AND SUCCESSFUL IMPLEMENTATION OF THE USVI HER AND HEAR PROGRAMS.
- THE SELECTED CONTRACTOR WILL SERVE AS THE PROGRAM IMPLEMENTER OF THE USVI HER AND HEAR PROGRAM DURING THE TERM OF ANY CONTRACT RESULTING FROM THIS SOLICITATION.
- SELECTED CONTRACTOR OR SUBCONTRACTOR SHALL BE RESPONSIBLE FOR HOME ENERGY ASSESSMENTS AND AUDITS IN ACCORDANCE WITH BPI-2400 MODELING. THE ASSESSOR OR AUDITOR SHALL HAVE THE EXPERIENCE NECESSARY TO AUDIT IAW INDUSTRY STANDARDS AND PROVIDE THE MOST ENERGY EFFICIENT RECOMMENDATIONS FOR THE CLIENT BASED ON THE REBATES AVAILABLE AND THE CUSTOMER'S BUDGET.
- THE SELECTED CONTRACTOR WILL ASSUME RESPONSIBILITY FOR THE REQUIRED INTERNAL QUALITY ASSURANCE AND QUALITY CONTROL FUNCTIONS TO ACHIEVE PROGRAM OBJECTIVES THROUGH A CONTINUOUS IMPROVEMENT PROCESS.

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### 3. SCOPE OF WORK

#### A. COMPLETION & REFINEMENT OF PROGRAM BLUEPRINT MATERIALS

VIEO MAY HAVE PARTIALLY OR FULLY DRAFTED CERTAIN BLUEPRINT COMPONENTS PRIOR TO CONTRACT AWARD. THE VENDOR SHALL:

- REVIEW ALL BLUEPRINT DOCUMENTS PREPARED BY VIEO.
- IDENTIFY GAPS, INCONSISTENCIES, OR COMPLIANCE ISSUES.
- UPDATE, REVISE, OR FINALIZE ANY SECTIONS REQUIRING MODIFICATION PRIOR TO PROGRAM LAUNCH.

BLUEPRINT COMPONENTS INCLUDE, BUT ARE NOT LIMITED TO:

- COMMUNITY BENEFITS PLAN
- CONSUMER BILL OF RIGHTS
- EDUCATION AND OUTREACH STRATEGY
- CONSUMER PROTECTION PLAN
- UTILITY DATA ACCESS PLAN



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- PRIVACY AND SECURITY RISK ASSESSMENT
- PROGRAM OPERATIONS PLAN
- IMPLEMENTATION SCHEDULE AND STAFFING PLAN

### MARKET TRANSFORMATION PLAN

- DEVELOP A MARKET TRANSFORMATION PLAN WITHIN 12 MONTHS OF SUBMISSION OF THE ORIGINAL BLUEPRINT DOCUMENTS.
- INCLUDE STRATEGIES FOR CONTRACTOR WORKFORCE EXPANSION, MARKET READINESS, TRAINING NEEDS, LOCAL BUSINESS PARTICIPATION, AND LONG-TERM ADOPTION OF HIGH-EFFICIENCY TECHNOLOGIES IN THE TERRITORY.

### B. CRM SYSTEM DESIGN & DEVELOPMENT

1. DESIGN AND BUILD A SCALABLE CRM PLATFORM THAT SUPPORTS MULTIPLE ENERGY EFFICIENCY PROGRAMS (HER, HEAR, AND WAP).
2. INCLUDE MODULAR WORKFLOWS ALLOWING SEPARATE PROGRAM RULES WHILE MAINTAINING SHARED DATA INFRASTRUCTURE.
3. PROVIDE SECURE PUBLIC AND ADMINISTRATIVE PORTALS FOR EACH USER TYPE.
4. ENSURE SYSTEM COMPATIBILITY WITH DOE/PNNL's API, REPORTING FORMATS, AND WORKFLOW REQUIREMENTS.
5. INTEGRATE MOBILE FUNCTIONALITY FOR CONTRACTORS, ASSESSORS, AND INSPECTORS TO CAPTURE FIELD DATA, PHOTOS, AND SIGNATURES.

#### B1. ELIGIBILITY VERIFICATION

THE SYSTEM MUST:

- VERIFY HOUSEHOLD INCOME ELIGIBILITY USING **AREA MEDIAN INCOME (AMI)** LEVELS BASED ON ZIP CODE OR GEOLOCATION.
- CONFIRM RESIDENCY WITHIN ST. CROIX, ST. THOMAS, OR ST. JOHN.
- CROSS-REFERENCED PREVIOUS REBATE OR WAP APPLICATIONS TO PREVENT DUPLICATION OR DOUBLE-DIPPING.
- REFERENCE A BEHIND-THE-SCENES **AMI** LOOKUP TABLE THAT:
  - IS BASED ON THE U.S. VIRGIN ISLANDS **10-YEAR CENSUS DATA**.
  - MUST BE **REVIEWED AND MANUALLY ADJUSTED ANNUALLY** TO REFLECT UPDATED OR INTERPOLATED AMI LEVELS UNTIL NEW CENSUS DATA ARE AVAILABLE.
- SUPPORT REAL-TIME ELIGIBILITY VERIFICATION THROUGH AUTOMATED LOOKUPS AND ADMINISTRATOR OVERRIDES FOR EDGE CASES.

#### B2. PROPOSED IMPROVEMENT ELIGIBILITY

- ENABLE CONTRACTORS OR ENERGY PROFESSIONALS TO SPECIFY EXISTING SYSTEMS TO BE REPLACED AND PROPOSED NEW IMPROVEMENTS (E.G., HVAC, WATER HEATER, INSULATION, WINDOWS, INDUCTION COOKTOP).
- VERIFY PROPOSED MEASURES AGAINST PROGRAM-SPECIFIC RULES, TECHNICAL STANDARDS, AND DOE-APPROVED PRODUCT LISTS.
- INCLUDE LOGIC TO DISTINGUISH BETWEEN **REBATE-ELIGIBLE UPDATES** AND **WAP-ELIGIBLE MEASURES**.

#### B3. MODELED ENERGY SAVINGS

- REQUIRE **BPI-2400** COMPLIANT DOE-APPROVED MODELING SOFTWARE FOR PROJECTS FOLLOWING THE MODELED SAVINGS PATH.
- STORE ALL ENERGY ASSESSMENT DATA AND RESULTS, LIMITED TO **COMPLETED AND INSTALLED MEASURES**.
- INCLUDE VERSION CONTROL FOR MODELING RESULTS, ENABLING DOE AUDIT VERIFICATION.

#### B4. SIGNATURE COLLECTION

- PROVIDE **DIGITAL SIGNATURE CAPTURE TOOLS** FOR CONSUMERS, CONTRACTORS, ASSESSORS, AND INSPECTORS.
- STORE SIGNED CONSENT AND VERIFICATION FORMS IN COMPLIANCE WITH **ESIGN ACT** AND DOE DOCUMENTATION STANDARDS.

#### B5. GEO-LOCATED PHOTOGRAPHS

- REQUIRE **GEO-TAGGED AND TIMESTAMPED PHOTOGRAPHS** FOR EACH INSTALLED MEASURE.
- LINK PHOTOS DIRECTLY TO CORRESPONDING PROJECT AND MEASURE RECORDS.
- PROVIDE **MOBILE PHOTO UPLOAD** CAPABILITIES WITH OFFLINE CACHING FOR LOW-CONNECTIVITY AREAS.

#### B6. QC INSPECTION RECORDS

- RECORD RESULTS FROM **QUALITY CONTROL INSPECTIONS**, INCLUDING:
  - COMBUSTION SAFETY AND AIR LEAKAGE TESTING.
  - HVAC COMMISSIONING AND SYSTEM PERFORMANCE TESTS.
  - CORRECTIVE ACTIONS AND RE-INSPECTION DOCUMENTATION.
- TRACK **WAP-SPECIFIC AUDIT AND INSPECTION DATA** FOR COMPLIANCE.

#### B7. CONTRACTOR CERTIFICATIONS

- MAINTAIN A REGISTRY OF **CERTIFIED CONTRACTORS, INSTALLERS, ASSESSORS, AND INSPECTORS**.



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- TRACK TRAINING CREDENTIALS, LICENSES, INSURANCE, AND EXPIRATION DATES.
- NOTIFY CONTRACTORS AND PROGRAM MANAGERS OF UPCOMING CREDENTIAL EXPIRATIONS.

### B8. FUND BRAIDING COMPLIANCE

- SUPPORT FUND BRAIDING MANAGEMENT FOR PROJECTS INVOLVING MULTIPLE FEDERAL GRANTS.
- GENERATE AND STORE DETAILED INVOICES SHOWING:
  - INDIVIDUAL UPGRADES.
  - ASSOCIATED FUNDING SOURCES (HOMES, HEAR, WAP, OR OTHER FEDERAL PROGRAMS).
  - VERIFICATION THAT UPGRADES ARE DISTINCT AND SEPARABLE.
- ENSURE COMPLIANCE WITH DOE AND OMB GUIDANCE ON FUND SEGREGATION AND FINANCIAL ACCOUNTABILITY.

### B9. DATA SECURITY AND COMPLIANCE

- IMPLEMENT RISK-BASED SECURITY CONTROLS IN ALIGNMENT WITH NIST SP 800-53 AND DOE CYBERSECURITY GUIDELINES.
- CONDUCT AND DOCUMENT:
  - SYSTEM RISK ASSESSMENTS.
  - PRIVACY AND SECURITY IMPACT ANALYSES.
  - DATA-SHARING RISK EVALUATIONS AND MITIGATIONS.
- ENSURE ENCRYPTION OF DATA AT REST AND IN TRANSIT.
- PROVIDE ROLE-BASED ACCESS CONTROL, DETAILED AUDIT LOGS, AND MULTI-FACTOR AUTHENTICATION.
- COMPLY WITH ALL U.S. VIRGIN ISLANDS PRIVACY AND DATA PROTECTION REGULATIONS.

### B10. DOE/PNNL API INTEGRATION

- INTEGRATE FULLY WITH DOE/PNNL'S API TO SUBMIT ALL REQUIRED PROJECT, ELIGIBILITY, AND REBATE DATA.
- FOLLOW ALL DOE-PROVIDED WORKFLOWS FOR REBATE PROCESSING, APPROVALS, AND DATA SYNCHRONIZATION.
- LOG AND ARCHIVE ALL API TRANSACTIONS FOR AUDIT TRACEABILITY.

### B11. REPORTING & AUDIT TOOLS

- PROVIDE DOE- AND VIEO-COMPLIANT REPORTING TOOLS TO SUPPORT:
  - PROGRAM PERFORMANCE METRICS.
  - ENERGY SAVINGS AND COST-EFFECTIVENESS TRACKING.
  - CONTRACTOR PARTICIPATION SUMMARIES.
- INCLUDE A FINAL AUDIT REPORTING MODULE TO VERIFY PROJECT COMPLETION, UPLOAD INSPECTION PHOTOS, AND CONFIRM COMPLIANCE. THIS COULD BE A SEPARATE DASHBOARD/REPORT MACRO THAT AN EXPORT FILE IS UPLOADED TO FROM THE CRM.

### B12. SUPPORT & MAINTENANCE

- OFFER TECHNICAL SUPPORT, UPDATES, AND SYSTEM MAINTENANCE FOR AT LEAST THREE YEARS POST-LAUNCH.
- PROVIDE STAFF TRAINING, USER MANUALS, AND DOCUMENTATION.
- SUPPORT ONGOING ANNUAL AMI TABLE UPDATES AND DOE/PNNL API VERSION UPGRADES.
- ALLOW FUTURE EXPANSION TO ADDITIONAL PROGRAMS OR FUNDING MECHANISMS.

## C. PROGRAM DESIGN & IMPLEMENTATION REQUIREMENTS

THE SELECTED VENDOR SHALL ASSIST THE VI ENERGY OFFICE (VIEO) IN COMPLETING ALL REMAINING PROGRAM DESIGN ACTIVITIES REQUIRED FOR THE SUCCESSFUL LAUNCH OF THE USVI HOME ENERGY REBATE PROGRAMS UNDER SECTION 50121 OF THE INFLATION REDUCTION ACT (HOMES AND HEAR). SELECTED VENDOR WILL SERVE AS THE PROGRAM IMPLEMENTER FOR THE HOMES AND HEAR PROGRAMS IN THE USVI. THIS INCLUDES ALL ADMINISTRATIVE, TECHNICAL, OPERATIONAL, AND CUSTOMER-SUPPORT TASKS NECESSARY TO EXECUTE A COMPLIANT, EFFICIENT, AND CUSTOMER-FRIENDLY REBATE PROGRAM.

IN SUPPORT OF LONG-TERM MARKET TRANSFORMATION AND SUCCESSFUL PROGRAM DELIVERY, VIEO SEEKS A CONTRACTOR THAT WILL COORDINATE, AS PART OF PROGRAM DESIGN AND EARLY IMPLEMENTATION SUPPORT, WITH MANUFACTURERS, DISTRIBUTORS, AND SUPPLIERS OF ELIGIBLE HIGH-EFFICIENCY EQUIPMENT AND TECHNOLOGIES. THIS COORDINATION SHALL BE LIMITED TO MARKET READINESS, PRODUCT AVAILABILITY, LOGISTICS AWARENESS, AND ALIGNMENT WITH PROGRAM ELIGIBILITY REQUIREMENTS, AND IS INTENDED TO SUPPORT A CONSISTENT AND RELIABLE SUPPLY OF COMPLIANT EQUIPMENT TO THE U.S. VIRGIN ISLANDS THROUGHOUT THE PROGRAM PERIOD AND BEYOND PROGRAM CLOSEOUT. THESE ACTIVITIES SHALL SUPPORT LONG-TERM MARKET SUSTAINABILITY AND LOCAL ACCESS TO HIGH-EFFICIENCY TECHNOLOGIES, WITHOUT CONFERRING EXCLUSIVE RELATIONSHIPS, PROCUREMENT AUTHORITY, OR PURCHASING COMMITMENTS ON BEHALF OF VIEO.



# Government of the United States Virgin Islands

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THE CONTRACTOR WILL SERVE AS THE PRIMARY PROGRAM IMPLEMENTER, ASSUMING RESPONSIBILITY FOR FULL PROGRAM ADMINISTRATION, REBATE PROCESSING, LONG-TERM OPERATIONS, CONTRACTOR MANAGEMENT, OR ONGOING CUSTOMER SUPPORT. ALL IMPLEMENTATION SUPPORT PROVIDED UNDER THIS CONTRACT SHALL BE AT THE LEVEL NECESSARY TO ENSURE THAT THE PROGRAMS ARE EXECUTED AS DESIGNED AND APPROVED. THE CONTRACTOR MAY MEET THESE OBJECTIVES THROUGH ITS OWN STAFF OR THROUGH MANAGED SUBCONTRACTORS, PROVIDED THAT ALL ROLES, RESPONSIBILITIES, AND LIMITS OF AUTHORITY ARE CLEARLY DEFINED AND DOCUMENTED.

### C1. APPLICATION & PROGRAM DESIGN ALIGNMENT

- RECOMMEND UPDATES TO THE PROGRAM APPLICATION, CUSTOMER INTAKE FORMS, CONTRACTOR WORKFLOWS, AND REQUIRED DOCUMENTATION TO ENSURE FULL ALIGNMENT WITH USVI PROGRAM RULES AND DOE REQUIREMENTS.
- ENSURE APPLICATION PATHWAYS SUPPORT SINGLE-FAMILY, MULTIFAMILY, OWNER-OCCUPIED, AND RENTER-OCCUPIED HOUSEHOLDS ACROSS ST. CROIX, ST. THOMAS, AND ST. JOHN.
- ENSURE ACCESSIBILITY FOR MULTIPLE LANGUAGES COMMONLY USED IN THE TERRITORY (ENGLISH, SPANISH, HAITIAN CREOLE).

### C2. VIEO COORDINATION & DESIGN MEETINGS

- PARTICIPATE IN RECURRING DESIGN MEETINGS WITH VIEO AND RELEVANT PARTNERS.
- PROVIDE WRITTEN SUMMARIES, DOCUMENTATION, AND UPDATED DESIGN ARTIFACTS FOLLOWING EACH MEETING.

### C3. REBATE STACKING & FUNDING INTEGRATION STRATEGY

THE VENDOR SHALL DESIGN METHODS TO STACK HOMES AND HEAR REBATES WITH OTHER LOCAL, FEDERAL, AND UTILITY PROGRAMS OPERATING IN THE TERRITORY, SUCH AS:

- WEATHERIZATION ASSISTANCE PROGRAM (WAP)
- LIHEAP
- VIHFA PROGRAMS
- VIEO ENERGY-EFFICIENCY AND RENEWABLE-ENERGY PROGRAMS
- ANY FORTHCOMING RESILIENCE OR ELECTRIFICATION INCENTIVES

METHODOLOGY MUST ENABLE VIEO TO:

- EXPAND THE SCOPE OF ELIGIBLE ENERGY-EFFICIENCY MEASURES.
- REDUCE PROJECT COSTS FOR USVI RESIDENTS.
- MAXIMIZE BENEFITS TO LOW-INCOME COMMUNITIES.

### C4. PROGRAM PRE-LAUNCH OPERATIONAL READINESS

- ASSIST VIEO IN PREPARING DETAILED OPERATIONAL WORKFLOWS PRIOR TO LAUNCH.
- SUPPORT PILOT-PHASE TESTING AND INITIAL PUBLIC-FACING MARKETING.

### C5. REBATE PROCESSING AND APPLICATION PORTAL

THE VENDOR SHALL:

- OPERATE THE ONLINE APPLICATION PORTAL AND INTAKE SYSTEM THROUGHOUT THE PROGRAM.
- COLLECT ALL REQUIRED HOUSEHOLD, BUILDING, CONTRACTOR, AND PROJECT INFORMATION NECESSARY FOR REBATE ELIGIBILITY.
- IMPLEMENT INCOME-ELIGIBILITY WORKFLOWS, INCLUDING DOCUMENT UPLOAD, VERIFICATION, AND CROSS-REFERENCING WITH ALLOWABLE DATASETS.
- PROVIDE MULTILINGUAL SUPPORT, ADA-COMPLIANT INTERFACES, AND PAPER APPLICATION WORKFLOWS WHERE NECESSARY.
- IMPLEMENT MARKETING SEGMENTATION AND TARGETED OUTREACH STRATEGIES BASED ON PROGRAM UPTAKE AND ISLAND-SPECIFIC DEMOGRAPHICS.
- INTEGRATE WITH THE DOE API FOR REBATE SUBMISSIONS, TRACKING, AND APPROVALS.
- DISBURSE REBATES TO CONTRACTORS OR HOUSEHOLDS, PER PROGRAM RULES.
- ASSIGN A CASE MANAGER OR POINT OF CONTACT FOR EACH APPROVED PROJECT TO PROVIDE ONGOING SUPPORT.

### C6. COORDINATION WITH OTHER FUNDING SOURCES

- ENGAGE WITH FEDERAL, TERRITORIAL, MUNICIPAL, UTILITY, AND NONPROFIT STAKEHOLDERS TO ALIGN FUNDING AND AVOID DUPLICATION.
- LEVERAGE ALLOWABLE FUNDS IN HOMES/HEAR PROJECTS TO IMPROVE AFFORDABILITY AND PROJECT REACH.
- IDENTIFY ADMINISTRATIVE, REGULATORY, OR PROCESS BARRIERS THAT PREVENT EFFECTIVE FUNDING COORDINATION AND RECOMMEND SOLUTIONS.

### C7. INCOME ELIGIBILITY DETERMINATION



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- DETERMINE CATEGORICAL AND DOCUMENT-BASED INCOME ELIGIBILITY FOR BOTH SINGLE-FAMILY AND MULTIFAMILY BUILDINGS.
- MAINTAIN DOCUMENTED ELIGIBILITY DETERMINATIONS AND AUDIT TRAILS.
- CONDUCT PERIODIC RE-VERIFICATION WHERE REQUIRED BY DOE.

### C8. PROJECT ELIGIBILITY DETERMINATION

THE VENDOR SHALL:

- REVIEW AUDITS, MODELING OUTPUTS, SAVINGS CALCULATIONS, CONTRACTOR PROPOSALS, AND SCOPE OF WORK.
- PROVIDE OR SUBCONTRACT ENERGY AUDITS WHERE NEEDED, PARTICULARLY FOR LOW-INCOME HOUSEHOLDS.
- COORDINATE WITH UTILITY-PROVIDED DATA WHERE AVAILABLE (VIA VIWAPA).
- APPROVE OR DENY REBATE APPLICATIONS IN ACCORDANCE WITH DOE AND VIEO RULES.
- MANAGE REBATE RESERVATIONS AND PREVENT DOUBLE COUNTING OR OVER-ALLOCATION OF FUNDS.
- CONDUCT FINAL PROJECT REVIEW AND TRIGGER REBATE ISSUANCE UPON COMPLETION.

### C9. MARKETING, EDUCATION & OUTREACH

- OPERATE THE PROGRAM CALL CENTER AND CUSTOMER SUPPORT CHANNELS.
- PROVIDE EDUCATIONAL RESOURCES TO RESIDENTS, CONTRACTORS, LANDLORDS, AND COMMUNITY PARTNERS.
- CONDUCT TARGETED OUTREACH TO LOW INCOME COMMUNITIES, SENIORS, RENTERS, AND UNDERSERVED GROUPS.
- PARTNER WITH LOCAL NONPROFITS, COMMUNITY-BASED ORGANIZATIONS, HOUSING AUTHORITIES, AND GOVERNMENT AGENCIES TO INCREASE PARTICIPATION.

### C10. CONTRACTOR NETWORK DEVELOPMENT & OVERSIGHT

- RECRUIT, TRAIN, AND MANAGE A QUALIFIED CONTRACTOR NETWORK ACROSS ALL THREE ISLANDS.
- PROVIDE PROGRAM DOCUMENTATION, TECHNICAL GUIDANCE, AND SUPPORT.
- MAINTAIN CONTRACTOR COMPLIANCE, INSURANCE DOCUMENTATION, LICENSING VERIFICATION, AND PERFORMANCE MONITORING.

### C11. AUDITOR NETWORK & ENERGY ASSESSMENTS

- DEVELOP STANDARDIZED MODELING PROCEDURES AND QUALITY STANDARDS.
- PROVIDE OR MANAGE CERTIFIED ENERGY AUDITOR SERVICES.
- ENSURE AUDITS ARE CONSISTENT, HIGH-QUALITY, AND COMPLIANT WITH DOE REQUIREMENTS.
- PROVIDE ENGINEERING SUPPORT WHERE NEEDED TO VALIDATE PROJECT SCOPES.

### C12. CONSUMER PROTECTION

- IMPLEMENT QUALITY ASSURANCE (QA) AND QUALITY CONTROL (QC) ACROSS ALL STAGES OF THE PROJECT LIFECYCLE.
- PROVIDE TRANSPARENT CUSTOMER FEEDBACK MECHANISMS.
- MANAGE DISPUTE-RESOLUTION PROCESSES BETWEEN CONTRACTORS AND CUSTOMERS.
- CONDUCT PERIODIC PROGRAM EVALUATIONS.

### C13. DATA COLLECTION, ANALYSIS & REPORTING

- IMPLEMENT DOE-COMPLIANT DATA PIPELINES, PRIVACY CONTROLS, AND REPORTING STRUCTURES.
- PROVIDE DASHBOARDS AND ANALYTICS TO VIEO ON PROGRAM STATUS, TRENDS, AND KEY METRICS.
- SUBMIT MONTHLY, QUARTERLY, AND FINAL PROGRAM REPORTS.
- PROVIDE CLEAN, AUDITABLE DATASETS FOR DOE REPORTING AND OVERSIGHT.

### C15. FISCAL MANAGEMENT & FINANCIAL COORDINATION

- PROVIDE SHORT-TERM PAYMENT ADVANCES OR PROGRESS PAYMENTS TO CONTRACTORS WHERE ALLOWABLE.
- COORDINATE FUNDING SOURCES AND FINANCING MECHANISMS TO REDUCE OUT-OF-POCKET COSTS FOR RESIDENTS.
- MAINTAIN TRANSPARENT FINANCIAL TRACKING AND ENSURE NO OVERPAYMENT OR DOUBLE-COUNTING OF FUNDS.



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### 4.A. DELIVERABLES FOR OBJECTIVE A — BLUEPRINT COMPLETION

THE CONTRACTOR SHALL SUBMIT FULLY DEVELOPED, DOE-COMPLIANT “APPROVED TO LAUNCH” BLUEPRINT DOCUMENTS NECESSARY FOR PROGRAM LAUNCH. DELIVERABLES INCLUDE:

#### 1. BLUEPRINT DOCUMENT PACKAGE (FINAL + REDLINE VERSIONS) FOR BOTH IRA 50121 (HOMES) & IRA 50122 (HEAR)

A COMPLETE, SUBMISSION-READY PACKAGE INCLUDING:

- COMMUNITY BENEFITS PLAN
- CONSUMER BILL OF RIGHTS
- CONSUMER PROTECTION PLAN
- DATA ACCESS PLAN
- EDUCATION & OUTREACH PLAN
- PRIVACY, SECURITY & RISK PLAN
- MARKET TRANSFORMATION PLAN
- PROGRAM OPERATIONS PLAN
- IMPLEMENTATION SCHEDULE & STAFFING PLAN
- ANY SUPPLEMENTAL MATERIALS REQUIRED BY DOE OR VIEO

EACH DOCUMENT MUST COMPLY:

- DOE REQUIREMENTS
- STAKEHOLDER INPUT INCORPORATED AND DOCUMENTED
- VERSION CONTROL AND REDLINE HISTORY
- COMPLIANCE CERTIFICATION STATEMENT

#### 2. BLUEPRINT INTEGRATION MATRIX

A DELIVERABLE SHOWING HOW EACH BLUEPRINT DOCUMENT:

- MAPS TO CRM SYSTEM REQUIREMENTS
- MAPS TO OPERATIONAL WORKFLOWS
- MAPS TO DOE SUBMISSION REQUIREMENTS

#### 3. MARKET TRANSFORMATION PLAN

DUE WITHIN 6 MONTHS OF ORIGINAL BLUEPRINT SUBMISSION, INCLUDING:

- WORKFORCE DEVELOPMENT ROADMAP
- CONTRACTOR TRAINING STRATEGY
- RETAILER READINESS ANALYSIS
- LOCAL BUSINESS PARTICIPATION STRATEGY
- SUPPLY CHAIN READINESS ASSESSMENT

#### 4. STAKEHOLDER ENGAGEMENT DOCUMENTATION

- MEETING SUMMARIES
- COMMENT LOGS
- UPDATED DRAFTS REFLECTING STAKEHOLDER INPUT

### 4.B. DELIVERABLES FOR OBJECTIVE B — CRM SYSTEM DESIGN & DEVELOPMENT

THE CONTRACTOR SHALL DELIVER A FULLY FUNCTIONAL, SECURE, DOE-COMPLIANT CRM SYSTEM FOR HER, HEAR, AND WAP.

#### 1. SYSTEM REQUIREMENTS SPECIFICATION (SRS)

DOCUMENTATION DETAILING:

- FUNCTIONAL REQUIREMENTS
- DATA STRUCTURE
- WORKFLOW LOGIC
- API INTERFACES
- ROLE-BASED ACCESS CONTROL DESIGN
- VALIDATION RULES



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- SECURITY PROTOCOLS (AES-256, TLS 1.2+, MFA, RBAC)

### 2. SYSTEM ARCHITECTURE & TECHNICAL DESIGN DOCUMENTS

- HIGH-LEVEL ARCHITECTURE
- DATA MODEL
- INTEGRATION ARCHITECTURE (DOE, VIWAPA, FEDERAL/TERRITORIAL SYSTEMS)
- MOBILE APPLICATION WORKFLOWS
- INFRASTRUCTURE DIAGRAM (CLOUD, HOSTING, BACKUP, FAILOVER)

### 3. FULLY FUNCTIONAL CRM SYSTEM

INCLUDING:

- PUBLIC AND ADMINISTRATIVE PORTALS
- CONTRACTOR, RETAILER, AND AUDITOR PORTALS
- APPLICATION INTAKE WORKFLOWS
- INCOME ELIGIBILITY MODULE
- PROJECT ELIGIBILITY MODULE
- MODELING DATA CAPTURE (BPI-2400)
- POS/RETAIL REBATES MODULE
- INSTALLER INCENTIVES WORKFLOW
- PHOTO DOCUMENTATION & GEO-TAG CAPTURE
- DIGITAL SIGNATURE CAPTURE
- WORK ORDER & INSPECTION MODULES
- QC/QA INSPECTION TRACKING
- FINANCIAL DISBURSEMENT SUPPORT
- FUND BRAIDING COMPLIANCE MODULE
- DOE/PNNL API FULLY INTEGRATED

### 4. UAT (USER ACCEPTANCE TESTING) PLAN AND TEST RESULTS

- TEST SCRIPTS
- SYSTEM TESTING REPORTS
- ISSUE LOGS AND RESOLUTION TRACKING

### 5. DATA SECURITY & PRIVACY DELIVERABLES

- SECURITY RISK ASSESSMENT
- PRIVACY IMPACT ASSESSMENT
- DATA SHARING RISK EVALUATION
- ENCRYPTION VALIDATION REPORT
- AUDIT LOG CONFIGURATION DOCUMENTS

### 6. SYSTEM DEPLOYMENT PACKAGE

- PRODUCTION-READY SYSTEM
- MIGRATION PLAN FROM STAGING TO PRODUCTION
- ROLLOUT AND TRAINING PLAN
- GO-LIVE READINESS CHECKLIST

### 7. COMPLETE DOCUMENTATION SET

- USER GUIDES (RESIDENT, CONTRACTOR, RETAILER, ADMIN)
- TECHNICAL MANUALS
- API DOCUMENTATION
- MAINTENANCE & PATCH PLANS
- DISASTER RECOVERY AND CONTINUITY PLAN

### 8. 3-YEAR SUPPORT & MAINTENANCE PACKAGE

- HELPDESK / TICKETING SYSTEM
- PATCH MANAGEMENT



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- ONGOING DOE API UPDATES
- ANNUAL AMI TABLE UPDATES
- VERSION UPGRADES AND ENHANCEMENTS

### 4.C. DELIVERABLES FOR OBJECTIVE C — PROGRAM DESIGN, IMPLEMENTATION & MANAGEMENT

THE CONTRACTOR WILL DELIVER ALL PROGRAM IMPLEMENTATION FUNCTIONS AND DOCUMENTATION REQUIRED FOR HER/HEAR OPERATIONS.

#### 1. PROGRAM OPERATIONS MANUAL (POM)

A COMPLETE OPERATIONS MANUAL COVERING:

- ELIGIBILITY RULES
- CONTRACTOR WORKFLOWS
- CUSTOMER SERVICE WORKFLOWS
- REBATE PROCESSING STEPS
- INSPECTION AND QC WORKFLOWS
- DOCUMENT RETENTION RULES
- COMPLAINT RESOLUTION PROCESS

#### 2. PROGRAM DESIGN ARTIFACTS

- INTAKE FORMS
- REQUIRED DOCUMENTATION LISTS
- CONTRACTOR AND AUDITOR SOPs
- INSPECTION CHECKLISTS
- ENERGY MODELING STANDARDS (BPI-2400)
- DOE COMPLIANCE CROSSWALKS

#### 3. REBATE STACKING & FUNDING INTEGRATION STRATEGY

A FORMAL STRATEGY DOCUMENT SHOWING:

- ELIGIBLE STACKING OPPORTUNITIES (WAP, LIHEAP, VIHFA, UTILITY PROGRAMS)
- SEQUENCING RULES
- FUNDING HIERARCHY AND FINANCIAL CONTROLS
- RECOMMENDED UPDATES FOR LONG-TERM INTEGRATION

#### 4. PRE-LAUNCH OPERATIONAL READINESS PACKAGE

- PILOT TEST PLAN AND RESULTS
- MARKETING AND OUTREACH PRE-LAUNCH MATERIALS
- CONTRACTOR ON-BOARDING DOCUMENTATION
- RETAILER ONBOARDING DOCUMENTATION
- PROGRAM READINESS CHECKLIST
- GO-LIVE DECISION BRIEFING FOR VIEO

#### 5. FULLY OPERATED APPLICATION & REBATE PROCESSING SYSTEM

DURING THE CONTRACT TERM, THE VENDOR WILL DELIVER:

- APPLICATION INTAKE AND ELIGIBILITY DETERMINATION
- INCOME VERIFICATION AUDIT TRAILS
- PROJECT APPROVAL WORKFLOW
- REBATE DISBURSEMENT
- CASE MANAGEMENT FOR EVERY PROJECT

#### 6. COORDINATION DELIVERABLES

- MEETING AGENDAS AND SUMMARIES
- UPDATED PROCESS MAPS
- STAKEHOLDER ENGAGEMENT LOGS

#### 7. CONTRACTOR & AUDITOR NETWORK DEVELOPMENT DELIVERABLES

- CONTRACTOR REGISTRY



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- AUDITOR REGISTRY
- CREDENTIAL VERIFICATION LOGS
- TRAINING CURRICULUM AND ATTENDANCE RECORDS
- CONTRACTOR PERFORMANCE SCORECARDS

### 8. QA/QC DELIVERABLES

- QA/QC PROTOCOLS
- RANDOM AND RISK-BASED INSPECTION SCHEDULES
- FINDINGS REPORTS
- CORRECTIVE ACTION DOCUMENTATION
- QUARTERLY QA/QC PERFORMANCE DASHBOARD

### 9. REPORTING & ANALYTICS DELIVERABLES

- MONTHLY PROGRAM STATUS REPORTS
- QUARTERLY PERFORMANCE & FINANCIAL REPORTS
- FINAL ANNUAL PROGRAM REPORTS
- DOE-COMPLIANT DATASETS AND REPORTING PACKAGES
- CONTRACTOR PERFORMANCE DASHBOARD

### 10. CONSUMER PROTECTION DELIVERABLES

- CUSTOMER FEEDBACK SYSTEM
- COMPLAINT RESOLUTION LOG
- MEDIATION AND DISPUTE RESOLUTION REPORTS
- QUARTERLY CUSTOMER SATISFACTION ANALYTICS

### 12. FISCAL MANAGEMENT DELIVERABLES

- DETAILED FINANCIAL TRACKING REPORTS
- FUNDING SOURCE SEGREGATION DOCUMENTATION
- FUND BRAIDING COMPLIANCE EVIDENCE
- REBATE PAYMENT REPORTS
- FINAL PROGRAM FISCAL CLOSEOUT

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## 5. PROPOSAL REQUIREMENTS

ALL PROPOSALS MUST CONTAIN SUFFICIENT INFORMATION FOR VIEO TO EVALUATE THE OFFEROR'S QUALIFICATIONS, CAPABILITIES, TECHNICAL APPROACH, AND ABILITY TO PERFORM ALL TASKS DESCRIBED IN THIS RFP. PROPOSALS MUST BE SUBMITTED AS A SINGLE PDF (OR WORD) DOCUMENT AND ORGANIZED IN THE EXACT SEQUENCE LISTED BELOW.

### 5.1 COVER LETTER

THE COVER LETTER SHALL BE SIGNED BY AN AUTHORIZED REPRESENTATIVE WITH THE LEGAL AUTHORITY TO BIND THE OFFEROR. THE LETTER MUST:

1. PROVIDE THE OFFEROR'S LEGAL NAME, PHYSICAL ADDRESS, MAILING ADDRESS, AND AUTHORIZED CONTACT PERSON (NAME, TITLE, PHONE, AND EMAIL).
2. CONFIRM THE OFFEROR'S COMMITMENT TO PERFORM ALL SERVICES OUTLINED IN THIS RFP.
3. EXPLICITLY STATE ACCEPTANCE OF ALL TERMS, CONDITIONS, AND EVALUATION FACTORS CONTAINED WITHIN THIS RFP.
4. ACKNOWLEDGE RECEIPT OF ALL AMENDMENTS TO THIS RFP, IF APPLICABLE.
5. INCLUDE A STATEMENT CONFIRMING THAT THE OFFEROR IS:
  - **WILLING TO COMPLY WITH ALL FEDERAL REGULATIONS GOVERNING THE GRANT FUNDING THIS PROJECT, INCLUDING DOE REQUIREMENTS FOR THE INFLATION REDUCTION ACT HOME ENERGY REBATE PROGRAMS.**
  - **WILLING TO ENTER INTO A CONTRACT WITH THE VIRGIN ISLANDS ENERGY OFFICE (VIEO) ON BEHALF OF THE GOVERNMENT OF THE U.S. VIRGIN ISLANDS.**

### 5.2 EXECUTIVE SUMMARY



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THE OFFEROR SHALL PROVIDE A CONCISE SUMMARY DESCRIBING ITS OVERALL APPROACH TO COMPLETING THE WORK DESCRIBED IN THIS RFP. THE SUMMARY SHOULD HIGHLIGHT:

- UNDERSTANDING OF USVI HER, HEAR, AND WAP PROGRAMS
- UNIQUE QUALIFICATIONS AND CAPABILITIES
- EXPERIENCE MANAGING CRM SYSTEMS, REBATE PROGRAMS, AND ENERGY-EFFICIENCY INITIATIVES
- PROJECT MANAGEMENT APPROACH (COST, SCHEDULE, RISK, QUALITY)
- KEY STRENGTHS TAILORED TO THE CHALLENGES OF THE U.S. VIRGIN ISLANDS

### 5.3 PROJECT APPROACH & TECHNICAL NARRATIVE

THE OFFEROR SHALL SUBMIT A DETAILED NARRATIVE EXPLAINING HOW THE SCOPE OF WORK WILL BE ACHIEVED. AT A MINIMUM, THE NARRATIVE MUST ADDRESS:

#### A. BLUEPRINT ASSISTANCE APPROACH

- METHODOLOGY FOR REVIEWING, REVISING, AND FINALIZING BLUEPRINT DOCUMENTS
- STAKEHOLDER ENGAGEMENT PROCESS
- TIMELINE AND VERSION CONTROL PROCEDURES
- APPROACH TO DOE COMPLIANCE AND SUBMISSION READINESS

#### B. CRM SYSTEM DESIGN & DEVELOPMENT APPROACH

- SYSTEM ARCHITECTURE, MODULAR DESIGN, AND MULTI-PROGRAM STRUCTURE
- DATA SECURITY CONTROLS (AES-256, TLS 1.2+, MFA, RBAC) (NIST COMPLIANT)
- API INTEGRATION APPROACH (DOE/PNNL, VIWAPA, ETC.)
- MOBILE FUNCTIONALITY, APPLICATION FLOWS, POS REBATE INTEGRATION
- EQUITY, ACCESSIBILITY, AND MULTILINGUAL REQUIREMENTS
- QC/QA FEATURES, AUDIT LOGGING, AND FINANCIAL TRACKING
- LONG-TERM MAINTENANCE AND SUPPORT STRATEGY

#### C. PROGRAM DESIGN & IMPLEMENTATION APPROACH

- STRATEGY FOR OPERATING HER/HEAR PROGRAMS END-TO-END
- INTAKE, ELIGIBILITY VERIFICATION, MODELING, AND INSPECTION WORKFLOW
- CONTRACTOR, AUDITOR, AND RETAILER NETWORK MANAGEMENT
- REBATE STACKING AND FUND BRAIDING APPROACH
- CUSTOMER SERVICE AND MULTILINGUAL SUPPORT
- CONSUMER PROTECTION AND DISPUTE RESOLUTION
- REPORTING AND DATA GOVERNANCE STRATEGY

#### D. IDENTIFICATION OF CHALLENGES & MITIGATION STRATEGIES

OFFERORS SHALL DESCRIBE POTENTIAL RISKS OR CHALLENGES AND PROPOSE MITIGATION METHODS.

### 5.4 DETAILED COST ESTIMATE

PROVIDE A DETAILED COST ESTIMATE BROKEN DOWN BY:

- PERSONNEL (FULL NAME, TITLE, HOURLY RATE, ESTIMATED HOURS)
- SUBCONTRACTORS (FULL NAME, TITLE, RESPONSIBILITIES)
- SOFTWARE AND LICENSING COSTS
- HOSTING, DATA STORAGE, AND SECURITY COSTS
- EQUIPMENT OR SUPPLIES
- TRAVEL AND LOGISTICS
- OTHER DIRECT COSTS

COST ESTIMATES MUST PROVIDE SEPARATE PRICING FOR:

1. BLUEPRINT ASSISTANCE (OBJECTIVE A)
2. CRM SYSTEM DESIGN, DEVELOPMENT & DEPLOYMENT (OBJECTIVE B)
3. PROGRAM DESIGN, IMPLEMENTATION & MANAGEMENT (OBJECTIVE C)
4. OPTIONAL TASKS OR ENHANCEMENTS (IF ANY)



# Government of the United States Virgin Islands

## VIRGIN ISLANDS ENERGY OFFICE

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A FULLY ITEMIZED BUDGET TABLE IS REQUIRED.

### 5.5 PAYMENT SCHEDULE

OFFERORS SHALL PROPOSE A PAYMENT SCHEDULE BASED ON CLEAR, MEASURABLE DELIVERABLES AND PROJECT MILESTONES, INCLUDING BUT NOT LIMITED TO:

- CONTRACT EXECUTION
- COMPLETION OF BLUEPRINT DRAFTS “APPROVED TO LAUNCH”
- CRM REQUIREMENTS SPECIFICATION
- CRM DEVELOPMENT MILESTONES
- SYSTEM TESTING & UAT
- PROGRAM LAUNCH READINESS
- GO-LIVE
- QUARTERLY IMPLEMENTATION DELIVERABLES

### 5.6 PROJECT SCHEDULE

A DETAILED PROJECT SCHEDULE SHALL BE PROVIDED IN GANTT CHART FORMAT THAT INCLUDES:

- MAJOR MILESTONES
- TASK DEPENDENCIES
- PARALLEL TASKS
- DELIVERY DATES FOR EACH MAJOR DELIVERABLE
- PROJECT LAUNCH SEQUENCE
- POST-LAUNCH SUPPORT TIMELINE

### 5.7 PERFORMANCE ESTIMATE (TECHNICAL CAPABILITIES)

OFFERORS MUST PROVIDE A TECHNICAL EXPLANATION DEMONSTRATING:

- ABILITY TO MEET DOE REQUIREMENTS
- ABILITY TO SECURELY HANDLE SENSITIVE CUSTOMER AND UTILITY DATA
- CAPACITY TO MANAGE HIGH APPLICATION VOLUMES
- ANTICIPATED SYSTEM PERFORMANCE METRICS (UPTIME, RESPONSE TIME, SCALABILITY)
- CRM PROCESSING THROUGHPUT AND DATA AUDITABILITY
- QA/QC CONTROLS
- CUSTOMER SUPPORT RESPONSE METRICS

### 5.8 WORK EXPERIENCE & QUALIFICATIONS

THE OFFEROR SHALL PROVIDE:

#### A. PAST PERFORMANCE NARRATIVES (UP TO THREE)

EACH NARRATIVE MUST INCLUDE:

- NAME OF PROJECT AND CLIENT
- SCOPE OF WORK AND RELEVANCE TO HER/HEAR/WAP OR SIMILAR PROGRAMS
- BUDGET AND FINAL COST
- SCHEDULE PERFORMANCE
- KEY CHALLENGES AND MITIGATION STRATEGIES
- DEMONSTRATED SUCCESS WITH ENERGY REBATE PROGRAMS, LOW-INCOME PROGRAMS, OR CRM IMPLEMENTATIONS
- EXPERIENCE WORKING IN ISLANDED, REMOTE, OR FEMA/DOE ENVIRONMENTS IF APPLICABLE

#### B. ORGANIZATIONAL & KEY PERSONNEL PROFILES

INCLUDE:

- PROJECT TEAM ORGANIZATIONAL CHART
- ROLES, RESPONSIBILITIES, AND LINES OF AUTHORITY



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- RESUMES OF KEY PERSONNEL (INCLUDING SUBCONTRACTORS)
- RELEVANT CERTIFICATIONS (BPI, PMP, CYBERSECURITY CREDENTIALS, CRM CERTIFICATIONS)
- PROFESSIONAL SEAL/CERTIFICATE NUMBERS WHERE APPLICABLE

### 5.9 REQUIRED DOCUMENTATION

OFFERORS MUST PROVIDE THE FOLLOWING:

1. **STATEMENT OF FINANCIAL STABILITY**
  - DOCUMENTATION DEMONSTRATING THE OFFEROR'S FINANCIAL CAPACITY TO PERFORM THIS WORK, WHICH MAY INCLUDE A LETTER FROM A FINANCIAL INSTITUTION, AUDITED OR REVIEWED FINANCIAL STATEMENTS, OR OTHER VERIFIABLE PROOF OF FINANCIAL STABILITY. VIEO MAY REQUEST CLARIFYING DOCUMENTATION FROM TOP-RANKED OFFERORS AS NEEDED.
2. **COPY OF CURRENT U.S. VIRGIN ISLANDS BUSINESS LICENSE (OR COMMITMENT TO OBTAIN PRIOR TO AWARD).**
3. **COPY OF CURRENT SAM.GOV REGISTRATION.**
4. **PROOF OF INSURANCE COVERAGE (OR STATEMENT OF INSURABILITY).**
5. **LIST OF ALL SUBCONTRACTORS, IF APPLICABLE, INCLUDING QUALIFICATIONS AND ROLES.**
6. **DISCLOSURE OF ANY LITIGATION, DEBARMENT, OR CONFLICTS OF INTEREST WITHIN THE LAST FIVE YEARS.**

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### 6. AUTHORIZATION FOR COOPERATIVE PURCHASING

PURSUANT TO **TITLE 31 OF THE VIRGIN ISLANDS CODE**, APPLICABLE PROCUREMENT REGULATIONS, AND THE POLICIES OF THE GOVERNMENT OF THE UNITED STATES VIRGIN ISLANDS ("GOVERNMENT"), THIS SOLICITATION AND ANY RESULTING CONTRACT(S) MAY BE MADE AVAILABLE FOR COOPERATIVE PURCHASING BY OTHER ELIGIBLE GOVERNMENTAL ENTITIES.

THE FOLLOWING ENTITIES ARE AUTHORIZED, AT THEIR DISCRETION AND WHERE PERMITTED BY LAW, TO PARTICIPATE IN COOPERATIVE PURCHASING OR "PIGGYBACK" ON ANY CONTRACT AWARDED AS A RESULT OF THIS SOLICITATION:

- **DEPARTMENTS, AGENCIES, BOARDS, COMMISSIONS, AUTHORITIES, AND INSTRUMENTALITIES OF THE GOVERNMENT OF THE UNITED STATES VIRGIN ISLANDS**
- **OTHER U.S. STATES, TERRITORIES, POSSESSIONS, OR COMMONWEALTHS, AND THEIR RESPECTIVE AGENCIES OR INSTRUMENTALITIES, INCLUDING BUT NOT LIMITED TO PUERTO RICO, GUAM, THE COMMONWEALTH OF THE NORTHERN MARIANA ISLANDS, AND AMERICAN SAMOA**
- **POLITICAL SUBDIVISIONS OF PARTICIPATING STATES OR TERRITORIES, INCLUDING COUNTIES, MUNICIPALITIES, SCHOOL DISTRICTS, AND SPECIAL DISTRICTS**
- **PUBLIC INSTITUTIONS OF HIGHER EDUCATION**
- **QUASI-GOVERNMENTAL ENTITIES AND OTHER PUBLIC BODIES AUTHORIZED BY LAW TO UTILIZE COOPERATIVE PURCHASING AGREEMENTS**

PARTICIPATION BY ANY SUCH ENTITY IS **VOLUNTARY** AND SUBJECT TO THE PROCUREMENT AUTHORITY AND APPROVAL REQUIREMENTS OF THE PARTICIPATING ENTITY.

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