

October 10<sup>th</sup>, 2024

## **Solar For All Grant Administrator Proponent FAQ**

Question	OMB - Answer
Clarification on Grant vs. Construction Oversight: The RFP includes tasks related to both grant management and construction oversight, such as monitoring milestones and ensuring compliance. Could you clarify the extent of the Grant Administrator's role in construction oversight, specifically whether site inspections are expected? Or is the focus primarily on grant compliance from a financial and administrative perspective?	The grant administrator is expected to primarily focus on grant compliance from a financial and administrative perspective.
Construction Oversight Scope: If construction oversight or on-site inspections are required, could you please clarify the expectations for this deliverable?	While this is not expected of the grant administrator, all efforts should be made to ensure that agreements with subrecipients include all requirements that the subrecipient must comply with as they relate to this aspect.
Clarification on Subrecipients vs. Stakeholders: The RFP mentions four subrecipient entities. Could you clarify whether the key partners are being considered as subrecipients, or as stakeholders or partners? If they are not subrecipients, does the program currently have subrecipients, and if so, will the contractor be responsible for updating and reviewing program procedures and grant agreements, including making recommendations for improvements?	While there is mention of the PR Coalition, the entities mentioned are to be considered as subrecipients. As they were already identified in the original proposal which was approved by the EPA.
Clarification on Quality Assurance Plans for Environmental Data: The RFP mentions the development of Quality Assurance Plans (QAPs) for environmental data. Could you provide more specific guidance on the requirements for these plans, including any established standards or guidelines we should follow to ensure data quality? Additionally, could you clarify what specific support will be necessary to ensure compliance with these requirements?	For further clarity with regard to this requirement please review EPA's Environmental Information Policy, Procedures and Standards (https://www.epa.gov/irmpoli8/environmental-information-policy-procedures-and-standards), specifically as they relate to Quality assurance Project Plan (QAPP) and the Quality Management Plan (QMP). As an additional note, QAPP and QMP require annual review.
Construction Monitoring and Engineering Resources: The RFP refers to monitoring construction and service milestones, with penalties for non-compliance. Will this task require on-site inspections by an engineer, or is it primarily focused on monitoring whether deliverables are completed on time?	This task will primarily be focused on oversight activities, including the establishment of policies and procedures to ensure subrecipient compliance.



Handoff Procedures for Disbursement Agreements: The RFP includes handoff procedures for performance-based disbursement agreements, including technical training and the legal transfer of oversight responsibility to a successor entity. Could you clarify what is expected in this handoff? Specifically, which roles are involved in the legal transfer, and what kind of technical training is anticipated?

At this time, the OMB is collaborating with subrecipients on the submission of work plans for the planning phase, which will start in 2025. During this planning period, the OMB will work closely with Coalition members to submit and approve project implementation plans. Funds will remain restricted until specific milestones are achieved. The inclusion of the handoff procedures in the RFP is intended to ensure that subaward agreements with subrecipients are established as early as possible. These agreements will outline funding restrictions that align with EPA guidelines, ensuring that access to funds is controlled until the required conditions are met.

Clarification on Record Retention Mechanism: The RFP calls for the development of a reliable mechanism for retaining records, documents, and communications. Could you clarify if there are specific systems or solutions that you prefer, or would any system that meets the stated requirements be acceptable?

Any system that meets the stated requirements and follows federal standards will be considered sufficient.

Submission & Approval of Quality Assurance Plans: Could you clarify the expectations for the initial submission and approval of the Quality Management Plan (QMP) and the Quality Assurance Project Plans (QAPPs)? Specifically, are there any existing templates or metrics that the contractor should follow for these plans, and how will the annual reviews be conducted? Additionally, if construction oversight is required, could you specify the quality control measures expected for on-site activities?

QAPP and QMP must be successfully submitted for approval to the EPA within 90 days of the start for the planning period (while the planning period is expected to begin on 01.01.2025, it is contingent on approval of the planning period work plan by the EPA). The EPA has offered guidance and templates as it related to these requirements, however we recommend that you review the EPA's Environmental Information Policy, Procedures and Standards for further guidance.

**Federal Reports**: Could you kindly clarify the reporting requirements specifically, what is meant by "transactions federal reports"?

The proponent is expected to assist in the submission of Semi-annual performance report and semi-annual transaction-level and project-level data, annual interim federal financial reports, EPA Form 5700-52A Annual reports, Final Federal Financial Reports and Closeout reports.

MBE/WBE Reporting: Could you also provide clarity on the MBE/WBE reporting requirements for this project? Are there specific metrics or documentation required to ensure compliance with federal standards for minority- and women-owned business participation?

As per EPA guidelines for MBE/WBE Reporting: EPA Form 5700-52A Annual Report (when the combined total of funds budgeted for procuring supplies, equipment, construction or services exceeds the Simplified Acquisition Threshold).

Comprehensive Reports on Actions and Advice: Could you clarify if the "comprehensive reports on actions taken and advice given" refer to the technical support provided to subgrantees? If so, are there specific reporting structures or formats required, or should these be developed as part of our solution?

While this requirement was included with the TA provided to subrecipients in mind, it is primarily focused on all activities completed by the selected proponent as they relate to the administration of the program.

Workforce Development Plan: Could you provide more details on the specific responsibilities for developing the PR Coalitions SFA Workforce Development Plan? Is the expectation to fully develop the content, including creating training programs and establishing partnerships with local institutions, or is the role more focused on providing strategic guidance? Additionally, are there specific metrics or outcomes that the Workforce Development Plan should achieve, such as job placement targets or certification programs?

The budget for the OMB under the program includes funds for the workforce development plan, as such the role would be focused on providing strategic guidance.

As for metrics and outcomes, we plan on using the planning period for developing these metrics, however guidance received from the EPA indicates that workplan should include a plan for creating high quality, middle-class jobs in the rapidly growing residential-serving distributed solar energy industry that pay family-sustaining wages and include strong labor standards, including benefits, safe working conditions, and the free and fair choice to join or form a union.

Plans should indicate how the recipient plans to ensure that workforce development programs interact with the projects they are funding and how are they making sure graduates from workforce development programs graduate to high-quality jobs. They should also include a description of how workforce training opportunities be provided and a strategy to engage with existing training providers, community-based organizations, DOL Workforce Boards, local labor unions, community colleges, and other stakeholders to create an ecosystem that supports an effective job training and placement pipeline for the region.

The expectation is for the GA firm to provide strategic guidance during the One year Planning period for the workforce plan development. and to collaborate with subrecipients to ensure strategic alignment.

**Proposal Format**: Regarding the proposal format, are there any specific restrictions on the size and layout of tables, charts, or diagrams? Should these elements follow the same guidelines as the rest of the document?

Please refer to requirements established on section 5 of the RFP.

**Cost Proposal Structure**: For the cost proposal, is there a preference between a fixed-price or hourly-rate structure? Additionally, how will the cost structure be weighted in comparison to qualifications and experience during the evaluation?

Please refer to Sections 4.7 and 5.2 of this RFP for requirement related to the evaluation criteria and cost structure for the proposal. OMB will be evaluating all proposed cost structures.

**Subrecipient Compliance**: The RFP mentions penalties for non-compliance by subrecipients. Since subrecipients are typically governed by subawards rather than contracts, could you clarify whether this refers to corrective actions under federal grant guidelines (e.g., 2 CFR 200), as opposed to formal penalties?

Yes, this requirement was included in reference to corrective actions under federal grant guidelines.

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Audited Financial Statements: According to Puerto Rican law, companies with revenue under \$10 million are not required to submit audited financial statements. In such cases, would compile financial statements be acceptable to meet the financial reporting requirements outlined in the RFP?	Yes, proposals for entities who are not required by law to generate audited financial statements in accordance with GAAP or IFRS standards will be considered with a proper justification to that effect.
What is the period of performance for the contracted services?	While the OMB is looking for the chosen proponent to begin related task as soon as possible, the proponent is expected to provide services until at least 04.30.2029 (close out Date) including any additional time necessary for closeout procedures.
Can the OMB provide the SFA proposal that was submitted to the EPA?	The OMB has decided to not provide the SFA proposal that was submitted to the EPA at this time.
Will the OMB be providing the Grant Management System or must it be considered within the proposal?	The proponent should not contemplate providing a GMS in response to this RFP. The OMB is unable to provide any additional information at this time as it related to this type of platform.
How does the OMB's mention of task orders relate to the proposed pricing structure?	Task orders are only mentioned as an example.
The RFP has no mention of a Table of Contents requirement. If the proposer includes a Table of Content, will it count towards the 40-page limit?	No, TOC will not be considered for the 40-page limit.
The RFP has no mention of a Confidentiality Statement requirement. If the proposer includes a Confidentiality Statement, will it count towards the 40-page limit?	No, this would count as an exhibit. For further guidance, please refer to section 7 of this RFP.
Can the OMB confirm if 11x17 pages are allowed for tables, charts, and exhibits as part of the submission?	As per Section 5 of the RFP: "Tables, charts, and other exhibit documents need not follow these size and margin guidelines but must be clearly legible."
Should the proponents price by task?	This wil be vary depending on the proposed cost structure. The OMB is not mandating any specific type of cost structure.
What does OMB consider as a Local Party?	Puerto Rico based entities who are duly registered in the Department of State.
We are a privately held CPA firm and prepares internal financial statements that are used by our partners to manage the firm. Our financial statements are audited by an outside CPA firm but they are not prepared in accordance with GAAP or IAS nor do they include Statement of Cash Flows but the departures are fully disclosed in Note 1 of our audited financial statements.  Would an audited financial statement comprise of Consolidated Balance Sheets, Consolidated Statements of Earnings, Consolidated Statements of Partners' Equity, Consolidated Schedule of Operating Expenses, and Notes	Proponents must adhere to the requirements established under this section is preferred, exceptions are only being provided for entities who are not required by law to generate audited financial statements in accordance with GAAP or IFRS standards with a proper justification to that effect.

to Consolidated Financial Statements comply with this requirement?	
If the answer to the previous question is no, would an audited financial statement comprise of Consolidated Balance Sheets, Consolidated Statements of Earnings, Consolidated Statements of Partners' Equity, Consolidated Schedule of Operating Expenses, and Notes to Consolidated Financial Statements and an unaudited (internal) Statement of Cash Flows comply with the requirement?	Please refer to the previous response.
Please clarify if proponents are allowed to submit a separate redacted copy of the Proposal.	Yes, however the proponent should also identify parts of the proposal that they deem as "Confidential," "Trade Secrets," or "Proprietary," on the unredacted version of the document.
Please provide a sample contract for review of standard terms and conditions.	OMB is planning to work jointly with all subrecipients to ensure compliance with program guideline and that they have all of the technical resources available for project implementation
Please identify the four subrecipient entities which comprise the Puerto Rico Solar for All Coalition.	Puerto Rico Public Housing Authority (AVP as per its Spanish acronym), Puerto Rico Department Economic Development and Commerce (specifically the State Energy Program), Proyecto ENLACE del Caño Martín Peña, and the Puerto Rico Green Energy Trust
How does the OMB plan to coordinate the participation of the four subrecipient entities mentioned in Section 2.2, and will the selected grant administrator have direct involvement with them?	Yes, the GA firm is expected to have some involvement with subrecipients to ensure compliance with applicable regulations and ensure project implementation. While OMB is the pass-through agency, the intent is for the OMB to work in collaboration with each subrecipient to ensure maximization of funds.
The Scope of Work indicates that the selected firm shall develop a reliable mechanism for the Government Parties to "retain all records." Please clarify if this refers to phone communications recordings and phone logs.	All records related to the administration of the grant [program in accordance with federal standards.
What is the anticipated award date?	Project Period is 05.01.2024 - 04.30.2029, however NOA was received and signed by EPA as of 07.11.2024.

email. Please clarify whether there is a file size limitation for rfp@ogp.pr.gov to ensure Proponents can successfully submit proposals.	expect to exceed this file size limitation, they should make all efforts to send a zip file or get in contact with OMB
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submit proposals	
· · ·	before the deadline so that can discuss any alternatives.
Please clarify how "Local Parties" are defined and	Puerto Rico based entities.
evaluated for bonus points.	
Please clarify whether Proponents may include a Table of Contents and/or section dividers in their submission.	Yes.
If Tables of Contents and section dividers are permissible,	
please clarify whether they are exempt from the 40-page	Yes.
limit.	
Are preparents permitted to include a 11 v 17 page	As per Section 5 of the RFP: "Tables, charts, and other
Are proponents permitted to include a 11 x 17 page for larger graphical elements?	exhibit documents need not follow these size and margin
Tot larger graphical elements:	guidelines but must be clearly legible."
Please confirm resumes may be submitted in an Appendix.	Yes.
Please clarify whether subcontractor responsibilities must	Yes, subcontractor responsibilities must be separated by
be separated by task if there are shared tasks between the	task if there are shared tasks between the Proponent and
Proponent and subcontractors.	subcontractors.
The RFP does not include invoice requirements. Please	Please refer to the Puerto Rico Department of Treasury's
clarify how invoices are to be submitted; how the approval	Circular Letter 1300-22-18 for guidance on submission of
process is managed, and the length of time before an	invoices to agencies.
approved invoice is paid.	
Please clarify whether there are required supporting	Please refer to the Puerto Rico Department of Treasury's
documents selected firms must submit with invoices.	Circular Letter 1300-22-18 for guidance on submission of
	invoices to agencies.
	Once selected, the intention is for the period of
Please clarify the anticipated period of performance	performance to begin as soon as possible. However the proponent is expected to provide services at least until the
Please clarify the anticipated period of performance for these Grant Administrator Services.	end of the project period for the grant (04.30.2029),
these draft Administrator Services.	including any additional time required for grant closeout
	activities.
	While it will be intended for the contract to be tied to the
Are there any provisions for contract renewal or	grant period, GPR contracts must be extended on an annual
extension?	basis (per FY)
	These items are not required to be submitted with the
Please confirm none of the items listed in section 6.2 are	proposal; however the selected proponent is expected to
required with proposal submission.	produce said items for contract execution.
	Proponents may send a separate redacted copy of the
	proposal. As a reminder, blanket statements of
Please confirm that financial information submitted in	confidentiality or the marking of each page of the proposal
Section 8 of the proposal may be redacted in addition to	as confidential shall not be deemed sufficient notice of an
marking the information "Confidential," "Trade Secrets," o	r information request exemption, and a Proponent who
"Proprietary," as noted in Section 7.2.	indiscriminately and without justification identifies most or
	all of its proposal as exempt from disclosure or submits a
	redacted copy may be deemed non-responsive.
	indiscriminately and without justification identifies most or all of its proposal as exempt from disclosure or submits a

If proponents are permitted to submit a redacted proposal, please confirm whether Proponents are permitted to submit an unredacted version and redacted version in two separate emails to ensure they are received by rfp@ogp.pr.gov and not blocked by file size limitations.	Yes, please consider that there is a 25mb file size limitation per email.
Will OMB provide the proposal submitted to EPA for the Solar for All program?	OMB has determined that copies of the proposal will not be provided in response to this RFP.
In the Background, Section 2.2, the RFP states "The Puerto Rico Solar for All Coalition, managed by the OMB, brings together four subrecipient entities to deploy solar and storage systems that will provide financial and resiliency benefits to thousands of low-income and disadvantaged households." What agencies or groups are included in the four subrecipients?	Puerto Rico Public Housing Authority (AVP as per it's Spanish acronym), Puerto Rico Department Economic Development and Commerce (specifically the State Energy Program), Proyecto ENLACE del Caño Martín Peña, and the Puerto Rico Green Energy Trust
In the SOW, Section 3.1, the RFP states "Support the Government Parties in the development of request for proposals (RFP), request for quotes (RFQ)" What services does OMB plan to procure? Will this support just be for OMB or which entities are included in "government parties"?	This support is expected to mostly be provided to the OMB, however the proponent is expected to provide some assistance to coalition members in matters related to federal funds management as they relate to SFA. As for services that the OMB plans to procure, they include but are not limited to Third Party Solar Deployment Contractor, Legal Firm, and Workforce Development.
In the SOW, Section 3.1, the RFP states it states "Provide assistance in the development of a performance-based disbursement plan and support the OMB in disbursing funds to selected subgrantees pursuant to established disbursement guidelines." Will these subgrantees be in addition to the four subrecipient entities already mentioned? How many subgrantees does OMB anticipate participating in the program? Will individual home owners be able to apply?	No, there are not additional subgrantees only the four referenced in the answer to Question #1.
In the Deliverables, Section 3.2, the list of deliverables includes a Revised Workplan & Budget for EPA approval.  Has OMB signed a grant agreement with EPA?	Yes, the OMB is currently working on the work plan for the planning period, which is expected to begin 2025. The planning period is intended to be used for the development of the full work plan for project deployment which is expected t last until May 2029.
In the Deliverables, Section 3.2, the list of deliverables includes "Request for Proposals (RFP) for contractual processes included in SFA application." What does OMB contemplate needing to procure?	Please reference answer for Question #2.
In the Deliverables, Section 3.2, the list of deliverables includes "Analysis and recommendations with regards to applicant's management." How many applicants does OMB anticipate? Is OMB requesting a risk analysis of subrecipients?	This requirement was included as it relates to OMB's and the subrecipients management.

In the Proposal Evaluation Criteria, Section 4.6, includes a bonus of 5 points for "local parties." Does this require the proposer to include one or more than one local firm on the team?	As per section 5.2, line item #7 of the RFP: To promote and foster the participation of local parties in providing professional services and local expertise, explain their expected role and how they will add value to the work and team proposed. Should the Proponent involve local parties, they should identify local parties involved and provide further information on the expected level of participation in the activities and interactions included as part of the proposed work approach.
Will OMB accept 2 years of audited and 1 year of interim unaudited financials?	The OMB can consider making this exception to this requirement, however proper justification for the interim unaudited financials must be provided.
What is the current software solution used by PR OMB, if any? Is PR OMB interested in integrating grants admin activities into OMB's existing software platform? Or the development of new grants administration software?	The OMB does not currently have a Grant Management Software; however, it is something that is currently being worked on. No further guidance can be provided at this time.
How will the cost proposal be evaluated – how do you achieve maximum?	Please refer to Sections 4.7 and 5.2 of this RFP for requirement related to the evaluation criteria and cost structure for the proposal.
Are there any in person requirements associated with this RFP, either for consistent on-island support or incremental on-island reporting / client meetings? And are there any limits to travel reimbursements?	While there are no specific requirements, the proponent is expected to have presence on the island during the project.
Will GSA rates be used to reimburse any travel expenses?	No, travel cost reimbursement will not be considered.
Is there a defined timeline for invoicing frequency or should this be outlined in the proposal response?	Invoicing timing for GPR is usually monthly.
Of the grant amount of 156,120,000 - how much does the OMB anticipate to be used for grant administration, versus implementation or other costs?	5% of grant fudns are reserved for administration of the grant. The rest of the funds will be passed on to subrecipients
How is the cost proposal being evaluated, what factors are considered to achieve maximum score for this category?	Please refer to Sections 4.7 and 5.2 of this RFP for requirement related to the evaluation criteria and cost structure for the proposal.
Can the OMB provide a copy of the proposal submitted to the EPA and approved on Apr 22 2024?	The OMB has determined that they will not be providing a copy of the proposal in response to this RFP.
Is there any guidance the OMB can provide on a period of performance and an anticipated start date for the grant activities?	Period of performance as per NOA = 05.01.2025 - 04.30.2029
Does the OMB anticipate that the grant process will encompass a series of phases for implementation? Either by subrecipient, or by multi vs single family rollout?	At the moment, the PR Coalition will be taking advantage of the 1-year planning period (while the period is set to last for one year, work plans may be approved before the end of the year) which will take place in 2025. During the planning period, the OMB and each subrecipient will work on the development of the final workplan for the implementation period, which is set to begin from the moment the EPA approved each workplan (workplans for each subrecipient is

	not contingent on the the entire workplan being completed for prime and subs) until 04.30.2029.
Does OMB expect that all 4 subrecipients will begin operations at the same time?	Timing will vary per subrecipient. This will mostly depend on when each subrecipients final work plan is approved by EPA.
Can OMB provide clarification on what qualifies as an exhibit?	Any document or attachments not considered for the evaluation criteria, (i.e. documents for contract execution, certifications that qualifies a business to do business in PR, statements of confidentiality, etc.)
Noted in 5.1 submission format section - Tables, charts, and other exhibit documents need not follow these size and margin guidelines but must be clearly legible Does the TOC belong to this exception, or does it count toward the page count of max 40 pages?	Table of contents will not count toward page count.
Is the proposal submitted by PROMB to EPA that gave way for this fund allocation available for review?	The OMB has decided to not share the proposal submitted to the EPA in response to the RFP process.
For a company that is less than three years old, is there an alternative way to comply with the requirements stated in section 5.8?	No, the OMB will only consider proposals from companies that can comply with this requirement. Exceptions are only being provided for entities who are not required by law to generate audited financial statements in accordance with GAAP or IFRS standards with a proper justification to that effect.
For the proposed personnel listing requirement, is it necessary to provide names of the resource or a description of the type of resource (i.e. Accountant, Sr. Engineer, etc.)?	Yes
Will resources hired via a professional services contract be considered subcontractors and therefore subject to disclosure requirements?	Yes, should the proponent identify the need obtain resources hired to provide a service in a matter that it is handling for the OMB, such request must be made to the OMB prior to the retention or contracting of the same and must obtain the written consent of the OMB to proceed with the subcontracting.
Could you provide a high-level breakdown of how the \$156M will be allocated, particularly how much will go toward grantees vs workforce development or other specific initiatives?	5% of grant funds are reserved for administration of the grant. The rest of the funds will be passed on to subrecipients.
Does OMB have an established target for the number of professionals and sub-areas required for solar deployment already? Is the focus more on strategy development and/or the execution of training programs?	Metrics and outcomes are set to be developed during the 1-year planning phase (2025). The focus is mostly focused on strategy development and alignment in collaboration with Coalition members as there are funds set aside in the budget for the Workforce Development component.

What is the Grants Manager's Role in advancing and supporting workforce development within the solar fields and engaging residents in Program planning and Implementation, as stated in section 2.2?	The focus is mostly focused on strategy development and alignment in collaboration with Coalition members as there are funds set aside in the budget for the Workforce Development component. As for engaging residents, the GA firm is expected to assist in the development and implementation, in collaboration with subrecipients, of
	plans to engage and work with community-based organizations that reflect the communities the program intends to serve.
Is the Grant Manager expected to perform inspection of installations for compliance?	The proponent is expected to establish the requirements and reporting framework to ensure that each subrecipient performs the necessary inspections and audits.
Is the Grants Manager expected to conduct monitoring related to construction standards, codes, and regulations?	The proponent is expected to establish a reporting framework to ensure that subrecipient compliance.
Please define the successor entity mentioned in the scope of work section 3.1 and who will the Grant Manager be conducting the handoff procedure with.	This is requirement was included in reference to the subaward agreements that will be completed with each subrecipient.
Does the OMB have a Web Management system, or does the proposer need to provide one?	No and no.
Does the Proposer need to provide a server and a physical area for the storage of documents and records?	Proponents must comply with all local (PR) and federal (2 CFR) recordkeeping policies
Will OMB be comfortable with a time and materials contract approach for this RFP?	OMB has not determined a final cost structure. OMB will evaluate al proposed cost structures.
Are there any defined tasks to be performed or to provide a fixed cost?	The proponent should refer to section 3 of the RFP. For any additional activities, the proponent should contemplate common grant management practices contemplating funding of a similar scale and they should refer to information the EPA's SFA FAQ resource center (https://www.epa.gov/greenhouse-gas-reduction-fund/frequent-questions-about-solar-all)
Does this RFP require Key Staff, and if so, what are the quantities and role description?	While the quantity and role description would be dependent on each proponent, the OMB does require that the proponent include information for key staff to demonstrate their ability and knowledge to provide the proposed services. Also, please refer to section 5.2, line item #3 of the RFP for further guidance.
Is there a breakdown of activities for this Program under this RFP?	Please refer to Sections 3.1 and 3.2 of this RFP. The final work plan has not been approved by the EPA.
Can the government provide a contract example for this RFP?	A sample contract for this RFP will not be provided at this moment. Please refer to the Comptroller's Contract Registry for contracts executed by the OMB.
Are there any required bonds for this RFP?	No

What is the minimum expected number of households to be impacted by this Program?	While an initial estimate was included in the initial proposal, the OMB will work with subrecipients for the revision of outputs and outcomes, including households to be impacted during the 1-year planning period.
What are the tasks specified under the Scope of Work Section.	Please refer to Section 3.1 of the RFP.
Will the OMB be providing a Cost Form for this RFP?	OMB will not be providing a cost form in response to this RFP process.