Power Forward Communities

Request for Proposals

MANAGEMENT CONSULTING SERVICES TO IMPLEMENT OPERATING MODEL

March 2024

Purpose

Power Forward Communities, Inc. (PFC) has initiated a Request for Proposal (RFP) process to support the implementation of PFC’s Operating Model as it relates to fulfilling its obligations and commitments under its application for the Environmental Protection Agency’s National Clean Investment Fund (NCIF) grant.

Please note that the Environmental Protection Agency has not yet made this grant award and, because of that, the award of this RFP is contingent upon PFC receiving notice from the Environmental Protection Agency that it has been selected as one of the grant awardees.

Overview

PFC seeks a contractor to:

- Summary of Required Services
  - Provide management consulting services to support the implementation of PFC’s Operating Model, which will include review and validation of the coalition’s Operating Model, the development of a detailed implementation plan, support services to implement such a plan, the establishment of business processes for key functions, advice – as needed – for federal contracting, and the potential to take on certain managed services on either a temporary or permanent basis, as needed.

- Eligibility on Bidding
We seek a consulting company with expertise in federal contracting and compliance, business process management, business model development, strategy, and, potentially, with capacity to self-perform certain core operations functions as managed services.

- Period of Performance
  - Initial term is thought to be 12 months, but may vary based on need.

About Power Forward Communities

Power Forward Communities (PFC) is a coalition of the country’s most trusted community development and housing organizations, including Enterprise Community Partners, Habitat for Humanity International, Local Initiatives Support Corporation (LISC), Rewiring America, and United Way Worldwide. PFC is an applicant for the National Clean Investment Fund (NCIF) grant from the Environmental Protection Agency (EPA) to spearhead affordable and accessible residential decarbonization throughout the country, with a specific focus on low-income and disadvantaged communities.

Assuming PFC wins the NCIF grant, PFC and its coalition members would each serve critical but separate roles:

**PFC Roles**

- Compliance
  - Comply with all EPA obligations (i.e., PFC is the prime awardee); interface directly with EPA.
  - Set minimum standards by which coalition members support fulfillment of EPA obligations.
  - Measure and enforce performance against those standards.

- Coordination
  - Coordinate and share out coalition member activity and serve as connective tissue to realize the benefit of the sum-of-its parts.
  - Serve as leader in supporting industry-wide standards for financial products/technical assistance.
  - Use scale to benefit purchasing power for coalition members’ benefit.

- Allocation
Allocate resources optimally and make decisions, in coordination with coalition members, to achieve greatest impact.

- Measure performance of its coalition members related to impact and resource allocation.

**Coalition Members Roles**

- Develop and deploy financial products ("financial product deployment").
- Build the market for those financial products and home/property-based decarbonization activity ("market building").
- Satisfy all obligations in sub-recipient agreement, report accurate/timely performance data related to activity, and conform to PFC’s minimum standards to support fulfillment of EPA obligations.

**Project Overview**

Given that both Power Forward Communities and the National Clean Investment Fund ("NCIF") are at the inception stage, work will be needed to establish the core operations of Power Forward Communities in order to fulfill its responsibilities and obligations to its five coalition members and to fulfill its responsibilities and obligations to the EPA.

**Scope of Work and Deliverables**

Power Forward Communities (PFC) seeks a contractor to perform, at minimum, the following activities as part of its scope of work:

- Review and validate Operating Model that the coalition members have approved.
- Develop detailed project implementation plan for Operating Model that begins at date of engagement and takes PFC out 6-12 months past EPA contract execution.
- Provide project management office ("PMO") services to implement project plan.
- These PMO services relate to the implementation of the Operating Model as distinct from PMO services to facilitate strategic coordination and decisions among the coalition members regarding core strategy execution.
- Identify and design PFC’s most important business processes (e.g., program and financial reporting, compliance, fund flows, timekeeping, cost-reimbursement, etc.) and
needed risk management controls, with supporting workflows and policies and procedures.

- Support the braiding together of the outsourced functions (i.e., Finance, IT, Data Analytics & Reporting) with the PFC platform.
- Advise PFC on EPA contract negotiation, as needed.
- Advise PFC on sub-recipient contract negotiations, as needed.
- Propose a menu with basic terms for performing “Managed Services”, which can be tapped as needed to quickly staff specific functions should PFC or its coalition members face implementation challenges or decide to delay building out those functions until a later date.

Should you believe other activities are necessary as part of a scope of work to perform the above activities, please list those out as well.

Please also include a list of key deliverables we can expect upon completion of each milestone of your work plan.

Budget

- We do not have a firm budget for this scope of work and look forward to the market helping to inform the cost estimate.
- We plan to issue one award to one consulting company.
- We are open to different billing structures, including fixed price, cost reimbursement (with profit margin negotiated), and time and materials.
  - If cost reimbursement or time and materials methodology is chosen, please provide a detailed build-up of your proposed cost.

Proposal Materials

Responses should include the following (please ensure that each numbered section is its own attached file in the submitted response):

1. Cover Letter – on company letterhead (should include the name, title, address, telephone number, and e-mail address for point of contact for the respondent organization).
2. Qualifications – include the contractor’s qualifications to conduct the scope of work activities, expertise, knowledge, and experience. Experience should include examples of conducting similar or related work.

3. Project Approach – narrative of contractor’s proposed approach, including:
   A. The process and specific activities to be conducted to achieve the stated goals.
   B. A timeline for the activities.
   C. Milestones and a detailed list of deliverables tied to activities.
   D. A detailed budget for each task, along with a proposed payment schedule tied to project milestones or deliverables (if applicable).

4. Project Budget – detailed submission and/or labor rate or price listing of all rates for all individuals who will work on the project (if applicable).

5. Engagement Team – resumes and bios for each individual on the specific engagement team we will be working with on a day-to-day basis, including information about experience with similar projects and professional qualifications.
   A. Approach to diversity of engagement team specifically and, more generally, whether any disadvantaged business enterprise (“DBE”) will be sub-contracted as part of your approach to fulfilling our scope requirements.

6. Work Samples – based on the past projects identified in the qualification section, attach samples of completed work relevant to the work needed in this RFP (no more than three).

7. References – based on the past projects identified in the qualification form, attach current contact information of clients for whom similar services were provided (no more than three).

8. Disclosure and Certifications
   A. Indicate whether you are presently engaged or plan to be engaged with any other recipient of Greenhouse Gas Reduction Fund dollars;
   B. Conflicts of Interest Statement (see below section on Conflicts of Interest); and,
   C. Lobbying Certification (see below section on Byrd Anti-Lobbying Amendment).

9. Partner Demographics Questionnaire – See Data Room.
10. Mark-Up of Contract – track changes to Power Forward’s standard contract terms and conditions (forthcoming in the Data Room). Please also note any changes, if any, to Power Forward’s standard insurance requirements (forthcoming in the Data Room).

Selection Criteria

Applicants will be evaluated on the following characteristics:

- **Qualifications, Experience and Past Performance – 33%**
  - The applicant has the qualifications necessary to successfully complete the scope of work.
  - The applicant has prior experience working on similar projects.
  - The applicant has prior experience working with similar organizations.
  - Quality of submitted work samples.

- **Approach & Work Plan – 33%**
  - The proposal demonstrates an understanding of the project objectives and desired results.
  - The proposal illustrates an approach to the scope of work that will likely lead to successful results.
  - The proposal illustrates the contractor’s ability to successfully execute the proposed approach.
  - The proposal adequately details project activities and milestones, or deliverables, associated with each stage of the scope of work.
  - The proposal includes a detailed timeline.
  - The work can be completed within the required project timeline.

- **Budget – 34%**
  - The proposal includes a detailed budget for each stage of the scope of work.
  - The proposed costs are reasonable.
  - The proposed changes to Power Forward’s standard contract terms and conditions are acceptable.

PFC will select the proposal which it determines will deliver the highest quality deliverable at the best value. Proposals will be evaluated using the weighted criteria identified above.
PFC, in its sole discretion, may request proposal interviews or presentations by meeting with any and all applicants to clarify or negotiate modifications to proposals. However, PFC reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the applicant can propose.

Submission Instructions

Proposals are due by 5:00 PM Eastern Standard Time on April 19, 2024.

Inquiries concerning this RFP should be directed to RFP@powerforwardcommunities.org with subject line “Management Consulting RFP.”

Proposals must be submitted to: RFP@powerforwardcommunities.org.

All costs incurred in the preparation of a response to this RFP are the responsibility of the applicant and will not be reimbursed by PFC.

By submitting a proposal, the applicant commits to the terms and conditions outlined in this RFP. Requests for exception to any terms or conditions must be submitted with the proposal. PFC reserves the right to deny requests for exception to any terms and conditions. Requested exceptions will be factored into PFC's consideration of award.

Right to Reject

PFC reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

Disadvantaged Business Enterprises

PFC is required to make the following good faith efforts whenever procuring construction, equipment, services and supplies to ensure disadvantaged business enterprises (DBEs) have the opportunity to compete for procurements funded by EPA financial assistance. Please advise in the context of your response whether you are a registered DBE and, if not, whether you plan to engage in any subcontractors who are registered DBEs.
Confidentiality

If the applicant deems any materials submitted to be proprietary or confidential, the applicant must indicate as such in the relevant section(s) of the response.

Timeline and Notification of Selection

- **RFP Posting:** March 20, 2024 (30-day Notice Period Begins).
- **Nondisclosure Agreement (NDA):** Respondents must execute NDA (live in data room) in order to receive access to data room, which includes (i) PFC’s NCIF application, (ii) a detailed PPT presentation explaining PFC’s Operating Model, and (iii) an Excel inventory of all of PFC’s obligations and commitments based on a reading of the EPA’s Notice of Funding Opportunity (NOFO) and PFC’s Application.
- **Q&A Calls:** March 20 – 29, 2024 (PFC will host a call with each individual respondent to brief respondent on PFC’s Operating Model and to answer and questions that respondent has at this stage of the process – an executed NDA will make this conversation most productive).
- **Letter of Intent of Submission:** March 26, 2024 (while not a requirement to submit a bid, PFC requests that respondents communicate to RFP@powerforwardcommunities.org a non-binding letter of intent to submit a response so that PFC can better plan ahead).
- **30-day Notice Period ends:** April 18, 2024.
- **Deadline for RFP Responses:** 5:00 PM Eastern Standard Time on April 19, 2024.
- **Follow-up Questions from PFC to Bidders:** Week of April 22, 2024.
- **Interviews with Bidders:** Week of April 29, 2024.
- **Notice of Award:** Week of May 13, 2024.
- **Contract Execution:** Week of May 27, 2024.
- **Notify Other Respondents of Non-Award:** Week of May 27, 2024.

Conflict of Interest

The applicant must disclose, in an attachment to the proposal, any possible conflicts of interest that may result from the award of the contract or the services provided under the contract. Except as otherwise disclosed in the proposal, the applicant affirms that to the best of its knowledge there exists no actual or potential conflict between the applicant, the applicant’s employees or their families’ business or financial interests (“interests”) and the services provided under the contract. In the event of any change in either interests or the services
provided under the contract, the applicant will inform PFC regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to PFC’s satisfaction or the applicant may be disqualified from consideration under this RFP. “Conflict of interest” shall include, but not be limited to the following:

- Giving or offering a gratuity, kickback, money, gift, or anything of value to a PFC official, officer, or employee with the intent of receiving a contract from PFC or favorable treatment under a contract;
- Having or acquiring at any point during the RFP process or during the term of the contract, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with applicant’s performance of its duties and responsibilities to PFC under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
- Currently possessing or accepting during the RFP process or the term of the contract anything of value based on an understanding that the actions of the applicant or its affiliates or interests on behalf of PFC will be influenced.


Contractors that apply or bid for an award exceeding $100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by ([31 U.S.C. 1352](https://en.wikipedia.org/wiki/Byrd_Anti-Lobbying_Amendment)).

**Applicable Requirements**

**SAM Registration**

All contractors receiving federal funds through PFC must maintain an active account in the System for Award Management (SAM). SAM is a free web site hosted by the federal government that consolidates the government-wide award reporting systems into one system. SAM streamlines processes, eliminating the need to enter the same data multiple times, and consolidates hosting to make the process of doing business with the government more efficient. The website and information on how to create a user account is found at [https://www.sam.gov/SAM/](https://www.sam.gov/SAM/). To receive an award, contractors must not have active exclusions or delinquent federal debt and may not be currently debarred, suspended, proposed for debarment or declared ineligible for awards by any federal agency. Additionally, make sure that any subcontractors that receive federal funds are aware that they must be registered in SAM in
order to be in compliance with federal reporting requirements.

**Federal Funding Accountability and Transparency Act (FFATA)**

Contractors must comply (as applicable) with FFATA and provide necessary information to enable PFC to comply with FFATA reporting requirements. Please visit [http://www.fsrs.gov](http://www.fsrs.gov) for more information.

**High-Rate Limitation**

PFC may not provide reimbursement for payment of the salary of a contractor at more than the daily equivalent of the rate paid for the level IV of the Executive Schedule. For more information on the Executive Schedule, please see the Office of Personnel Management (OPM) website at [https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/2024/general-schedule](https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/2024/general-schedule). In order to verify this requirement is being met, PFC may require additional information regarding a breakout of direct and indirect expenses within budgets and rates.

**Data Room**

*If you would like access to the Data Room, please email RFP@powerforwardcommunities.org for assistance.*

1. Nondisclosure Agreement (*live in data room*)
2. EPA’s Notice of Funding Opportunity (EPA-R-HQ-NCIF-23) (*live in data room*)
3. Partner Demographics Questionnaire (*live in data room*)
4. PFC Standard Terms & Conditions (*access upon executed NDA*)
5. PFC Contractor Insurance Requirements (*access upon executed NDA*)
6. PFC’s NCIF Application (*access upon executed NDA*)
7. PFC Inventory of Obligations and Commitments (*access upon executed NDA*)
8. PFC Operating Model Overview (*access upon executed NDA*)