



**Request for Proposals:**  
**Solar Opportunities Indiana**  
**Grant Management Software Services**

**Date of Issues:** March 31, 2025

**Proposals Due:** May 2, 2025, 5pm Eastern Time

**All proposals must be submitted to:**

[soiprocurement@incap.org](mailto:soiprocurement@incap.org)

# **1. Introduction and Purpose**

## **Organization Overview Request**

The Indiana Community Action Association (IN-CAA), a nonprofit organization based in Indianapolis, Indiana, leads Solar Opportunities Indiana (SOI), a coalition established to manage the \$117 million Solar for All (SFA) grant awarded by the U.S. Environmental Protection Agency (EPA) through the Greenhouse Gas Reduction Fund (GGRF). SOI unites a diverse group of stakeholders to expand equitable access to solar energy across Indiana, including municipalities, advocacy groups, educational institutions, faith-based organizations, and renewable energy experts. Key coalition members include the cities of Fort Wayne, Gary, and Indianapolis; Energy Matters Community Coalition; Indiana Solar Equity for All Alliance; Earth Charter Indiana; Solar United Neighbors; Faith in Place; Citizens Action Coalition; and the Indiana Energy Independence Fund. As federal grant funding priorities may shift with changes in administration, SOI is closely monitoring any potential policy or budgetary changes that could impact program operations. At this time, funding for Solar for All remains available, and SOI continues to move forward with implementation.

## **About the Solar Opportunities Indiana (SOI) Coalition**

The SOI Coalition's mission is to address structural barriers in the solar energy market, reduce upfront costs, and foster innovative policy solutions to expand solar energy access for underserved communities. Together, the coalition aims to solarize at least 3,537 low-income homes and serve an additional 4,430 homes through community solar fields and microgrids. By developing tailored financial products and incentives for low-income and disadvantaged community (LIDAC) residents, SOI seeks to catalyze Indiana's clean energy market while strengthening workforce development initiatives and forging partnerships that foster a grassroots-led transition to renewable energy. These efforts aim to create a resilient and equitable energy market that bridges the gap between current challenges and a sustainable future.

Each coalition member plays a distinct role in advancing these objectives. IN-CAA serves as the lead grantee, managing financial oversight, subawards, and compliance with EPA regulations. Five coalition members will implement solar projects, including the municipalities of Indianapolis, Fort Wayne, and Gary, as well as the Energy Matters Community Coalition and the Indiana Solar Equity for All Alliance. Their projects will vary from conducting feasibility studies and financing low-income solarization projects to piloting innovative community solar fields on brownfield sites and developing residential solar projects with battery storage. Additionally, Faith in Place and Earth Charter Indiana will manage community outreach, education, and marketing. Finally, Solar United Neighbors and Citizens Action Coalition will provide technical and regulatory assistance to ensure projects are optimized and aligned with state policy goals.

## **Purpose of the Request for Proposals (RFP)**

Given the complexity of this collaborative effort, a robust grant management system is essential to streamline communication, manage subawards, track project progress, and ensure compliance with federal and state regulations. The system must facilitate reporting, support data-driven

decision-making, and ensure equitable outcomes across diverse communities. This centralized tool will enable SOI to coordinate its multi-stakeholder efforts effectively, delivering transformative solar solutions for Indiana’s underserved populations.

To support its mission, the SOI Coalition is seeking proposals for a comprehensive grant management system to streamline multi-stakeholder functions. This system will integrate application and case management; financial assistance tracking; contractor management; and reports and analytics into a cohesive platform. The system must enable data-driven insights, foster inclusive engagement, and ensure equitable outcomes. It will serve as a critical tool in advancing solar energy adoption across Indiana’s underserved communities, ensuring transparency, efficiency, and impactful program delivery.

## 2. Scope of Work

### Project Objectives:

The primary objective of this project is to implement a comprehensive grant management system that will serve as a central platform for managing and supporting the SOI coalition’s efforts. This system will streamline processes involving multiple stakeholders, enhance collaboration among diverse partners, ensure compliance with regulatory requirements, and provide robust reporting capabilities. Specific goals include:

- **Streamline Processes:** Centralize and automate workflows to improve efficiency in managing grant distribution, case management, financial assistance, contractor coordination, environmental data collection, and other critical functions.
- **Improve Collaboration:** Facilitate seamless communication and data sharing among coalition members, including municipalities, advocacy groups, and renewable energy experts, to ensure cohesive and effective program execution.
- **Enhance Stakeholder Engagement:** Streamline interactions with applicants and contractors by providing tools for efficient communication, documentation management, and status tracking, ensuring timely and transparent processes.
- **Ensure Compliance:** Provide tools to monitor and maintain compliance with federal and state regulations, including reporting requirements tied to EPA’s Solar for All grant.
- **Enhance Reporting:** Enable the generation of detailed, customizable reports to track program progress, measure impact, and provide transparency to stakeholders and to meet EPA requirements.

By addressing these objectives, the system will play a pivotal role in advancing equitable solar energy access across Indiana’s underserved communities while ensuring the efficient and transparent use of program resources.

### Key Features Required:

The proposed grant management system must support the following core functionalities, with a focus on promoting equity in all areas of implementation and stakeholder engagement.

### **1. Application Management**

- Ability to track grant applications, funding disbursement, and compliance requirements to ensure eligibility criteria are met.
- Provide tools to monitor and evaluate the distribution of funds, ensuring equitable access to grants for underrepresented and underserved communities.
- Include decision-making capabilities to enable integration such as income verification, proof of property ownership and verification of LIDAC status (e.g., through the Climate & Economic Justice Screening Tool)
- Integration of metrics to assess the impact of grant funding on target populations.

### **2. Case Management**

- Robust case tracking for individuals, organizations, and communities participating in solar initiatives.
- Equity-focused data fields to capture demographic information (e.g., income levels, geographic location, and minority status) to monitor inclusion and equitable outcomes.
- Tools for ensuring that case management practices prioritize historically marginalized groups.

### **3. Financial Assistance Tracking**

- Support the comprehensive management, analysis, and reporting of diverse financial assistance strategies that facilitate the administration of subsidies, grants, and other financial assistance programs, including revolving loan funds and gap financing for home upgrades.
- Integrate with external programs (e.g., IRA tax credits, state incentives) and bulk procurement initiatives to reflect cost savings and optimize funding allocation.
- Track financial assistance metrics, including total funds deployed, household savings achieved, geographic reach, and investments in minority- and women-owned businesses.
- Built-in features to analyze the impact of financial assistance on equity outcomes and generate alerts for disparities in resource distribution or gaps in assistance coverage to ensure equity goals are met.
- Offer flexibility to incorporate new financial assistance types, adjust program parameters, and align with evolving tax policies or regulatory requirements.

### **4. Contractor Management**

- Tools for managing contractor assignments, tracking milestones, and evaluating performance.
- Features to ensure diverse contractor participation, including tracking contractor demographics (e.g., minority- or women-owned businesses) and compliance with equity goals.
- Alerts for underrepresentation or non-compliance with equity targets in contractor engagement.

### **5. Reports, Analytics, and Performance Metrics**

- Customizable dashboards to track performance metrics, including equity-focused indicators such as demographic reach, geographic distribution, and program accessibility.
- Data visualization tools to highlight equity-related insights for internal and external reporting.
- Predictive analytics to identify gaps in service delivery and recommend strategies to enhance equity in future initiatives.
- Environmental data integration that enables flexibility to incorporate evolving information, that supports the aggregation and reporting of environmental metrics to provide comprehensive overviews of program impacts.
- Exportable reports to ensure the ability to pull consistent and accurate reports that can be exported in multiple formats, including PDF and Excel, to facilitate analysis and sharing.
- Data retention for up to three years after the program's conclusion, ensuring long-term accessibility for compliance, evaluation, and future planning.
- The system must facilitate the collection, tracking, and reporting of metrics in the following programmatic areas:
  1. **Program Activities:** Track grant funds deployed by cost type, geography, and project type. Monitor financial and technical assistance deployment and gather findings from program evaluations and stakeholder feedback.
  2. **Climate and Air Pollution Benefits:** Measure the number and type of projects financed, solar and storage capacity installed (MW, MWh), clean energy generation (MWh), and reductions in greenhouse gas emissions and other pollutants (e.g., CO<sub>2</sub>e, particulate matter).
  3. **Equity & Community Benefits:** Track households benefiting from projects, savings delivered, investments in or partnerships with women- and minority-owned businesses, and reductions in energy burden disparities.
  4. **Workforce Development:** Monitor workers trained, starting wages, solar jobs created, and projects using tools to promote good jobs. Measure increases in wages for individuals working in solar energy.
  5. **Market Transformation:** Track private sector financing mobilized, engagement with Community-Based Organizations (CBOs), and changes in policies such as net metering caps, interconnection timelines, and Solar Renewable Energy Credit (SREC) values. Monitor clean energy capacity and capital deployed beyond Solar for All projects, categorized by geography, project type, and community type.

## 6. Technical Assistance

- Ongoing training and support to provide initial training sessions for all users, including subgrantees, with continued access to training materials, user guides, and knowledge base resources.
- Dedicated support staff to dedicated technical support representatives to address enhancement requests, troubleshoot system issues, and assist beyond initial implementation.

- User interface access to allow SOI administrative users to access and monitor the system from all user perspectives, ensuring visibility across different roles.
- Flexible user permissions to provide customizable user roles and permission settings to control access levels for various stakeholders, including SOI, subgrantees, and contractors.
- User-friendliness and data protection to ensure the system is intuitive and accessible for all users while incorporating robust data security measures to protect sensitive client information and comply with relevant privacy regulations.

### 3. Proposal Guidelines

Each proposal must contain sufficient narrative responses that provide sufficient information to accomplish the activities described in the **Scope of Work**, directly above. Failure to include all of the information may be cause for rejection. Additional information may be provided if it is relevant to the goals of the RFP. Any additional information included that is not specifically requested should be included as an appendix to the proposal.

**Executive Summary:** Provide a high-level overview of the proposed solution, outlining how it meets the objectives and scope of this RFP. Highlight key differentiators that set your solution apart.

**Qualifications and Team:** Describe your company and provide a statement of qualifications for performing the requested or similar services. Please include an organizational chart and any variation in staffing levels over the past three years. Provide a summary of the role, qualifications and experience of each team member and designated project manager assigned to this project. Include length of service for each team member. Please identify the key personnel who will be assigned to these activities and what role each will play in enabling the firm to successfully meet the scope of services. Include resumes of only those personnel who will be assigned to these activities.

**Detailed Technical Description:** Include a thorough description of the proposed system, addressing its features, functionalities, architecture, and ability to meet the specified project objectives. Clearly state how the system prioritizes equity, supports multi-stakeholder collaboration, and facilitates the required data management functionalities.

**Project Plan:** Provide a detailed discussion of your company's approach to the successful completion of this project. Include thorough discussions of methodologies you believe are essential to accomplishing each task. Include a proposed work schedule and timeline to accomplish all of the required tasks and identify the team member responsible for each.

**Cost Breakdown:** Provide a detailed cost breakdown, including:

1. Initial costs (e.g., licensing, setup, hardware, or customization).
2. Ongoing maintenance costs (e.g., support, updates, or subscription fees).
3. Optional or add-on features and their associated costs.

**Demonstrations or Trial Capabilities:** If applicable, include information on any available demonstrations, trial access, or sandbox environments that allow evaluators to explore the proposed system. Specify the process for requesting access and any associated costs or conditions.

**Competency:** SOI seeks to ensure that the selected proposer possesses the necessary resources, expertise, and experience to deliver the specified services in a timely and satisfactory manner. To evaluate your organization's competency, please provide the following information:

- A list and explanation of any pending bankruptcies, liens, judgments, lawsuits, arbitrations, or similar actions filed or resolved within the past seven (7) years.
- An indication of whether any client has ever terminated a contract with your organization for breach of contract. If applicable, please provide a detailed explanation of the circumstances surrounding the termination.

#### 4. Evaluation Criteria

Proposals should be clear, concise, and free of promotional material unless directly relevant to the proposed solution. The evaluation process will prioritize proposals that effectively address the objectives outlined in the RFP while demonstrating a strong commitment to equity and inclusivity in advancing solar adoption. Successful proposals must meet the following mandatory requirements: the ability to integrate all required functionalities, scalability to accommodate future growth, and compliance with applicable regulations, including federal grant requirements and data security standards. Proposals will be scored on the following merits:

No.	Evaluation Factor	Points Available
1	<b>Technical capabilities</b> Evaluates the system's ability to meet the technical requirements outlined in the RFP, including features, functionality, and scalability.	30
2	<b>Ease of use and training</b> Assesses the user-friendliness of the proposed system and the quality of training and support provided for stakeholders.	20
3	<b>Cost-effectiveness</b> Considers the overall cost, including initial implementation, ongoing maintenance, and optional features, in relation to the proposed value.	20
4	<b>Implementation timeline</b> Measures your ability to meet the proposed timeline and deliver a phased or full implementation on schedule.	15
5	<b>Vendor experience and references</b> Reviews your prior experience with similar projects, as well as references from previous clients.	10
6	<b>Inclusive Workforce Engagement</b> Awards points to those demonstrating efforts to employ minorities and women, per EPA guidelines, particularly in project roles tied to this RFP.	5

## 5. Timeline

Date	Milestone/Event	Description/Focus
March 31, 2025	RFP Issued	Release RFP to vendors
April 11, 2025	Questions due	Deadline for vendor questions due to SOI by 5:00 p.m. EST.
April 18, 2025	All answers to questions will be made available	SOI will post questions and answer to the SOI Public Notices webpage
<b>May 2, 2025</b>	<b>Proposal Submission Deadline</b>	<b>Final Day to submit proposals</b>
May 5 – 15, 2025	Evaluation Period to select finalists	Finalists will be notified of the date and time for virtual presentations
May 19–May 24, 2025	Finalist virtual presentations	Virtual demonstration of software systems
May 30, 2025	Vendor Selection Notification	Selected
June 2–30, 2025	Contract Finalization & Initial Onboarding	Alignment on project goals, deliverables, and timelines

## 6. Submission Requirements

All proposals must be submitted by the specified deadline to ensure consideration. Late submissions will not be reviewed. **Proposals should be submitted via email with the subject line “SOI Grant Management Proposal,” at SOIprocurement@incap.org no later than May 2, 2025, by 5pm EST.** Submissions must be provided in electronic format, preferably as a **PDF or Microsoft Word document**, to ensure compatibility and ease of review. Proposers will also be notified of our selection by email.

- **Proposal Length:**
  - Proposals should be **concise yet comprehensive**. Proposers are encouraged to focus on addressing the key requirements and evaluation criteria outlined in the RFP. Additional appendices, such as case studies or technical specifications, may be included if necessary.
- **Attachments:**
  - **Qualification Cover Sheet:** The Respondent must submit a completed Cover Sheet which is found in **Attachment A** of this RFP, including the Summary of Qualifications and the table at the bottom of the page.
  - **Certification:** Please complete and attach the Respondent Certification located in **Attachment B** of this RFP.
  - **Vendor Certification Forms:** Include any relevant certifications or licenses demonstrating the vendor’s qualifications.
  - **Cost Worksheets:** Provide a detailed cost breakdown as outlined in the Proposal Guidelines, including initial costs, ongoing maintenance, and optional features.
  - **References:** Submit at least **three (3) references for projects, case studies or services similar in nature and scope that have been completed within the last**



**five years** to demonstrate **your** experience and reliability. Include brief description of the projects, dates, and reference contact information. **Nonprofit and other public sector references are preferred.**

- o **Additional Supporting Documentation:** Any other documents or forms that support the proposal, such as organizational charts, resumes of key personnel, or technical specifications, may be included as appendices.

## **7. Federal Requirements**

This procurement is subject to all applicable federal and state laws and regulations. SOI encourages participation from small businesses, including Disadvantaged Business Enterprises (DBEs), minority-owned businesses, women-owned businesses, and labor surplus area firms. All contractors must certify that they are not debarred or suspended from receiving federal funds.

The following terms and conditions, when applicable, are incorporated by reference and apply to this solicitation and resulting contract(s). These requirements may also need to be flowed down to lower-tier subcontractors as appropriate.

### *For All Solicitations and Contracts*

- 2 CFR 200.322: DOMESTIC PREFERENCES FOR PROCUREMENTS
- 2 CFR 200.216 PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
- 40 CFR 33 APPENDIX A TERM AND CONDITION:

“The contractor shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. The contractor shall carry out applicable requirements of 40 CFR part 33 in the award and administration of contracts awarded under EPA financial assistance agreements. Failure by the contractor to carry out these requirements is a material breach of this contract which may result in the termination of this contract or other legally available remedies.”

### *For All Solicitations and Contracts in Excess of \$10,000*

“All contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement.”

### *For All Solicitations and Contracts in Excess of \$150,000*

- 42 USC 85 CLEAN AIR ACT
- 33 USC 26 FEDERAL WATER POLLUTION CONTROL ACT

By submitting a proposal, your entity agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 USC 7401-7671q) and the Federal Water Pollution Control Act as amended (33 USC 1251-1387).

### *For All Solicitations and Contracts in Excess of \$25,000*

- 2 CFR 180 DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 & 12689)

For All Solicitations and Contracts Equal to or in Excess of \$25,000

- 2 CFR 1532 NONPROCUREMENT DEBARMENT AND SUSPENSION
- For All Solicitations and Contracts in Excess of \$100,000
- 31 USC 1352 LIMITATION ON USE OF APPROPRIATED FUNDS TO
- INFLUENCE CERTAIN FEDERAL CONTRACTING AND FINANCIAL
- TRANSACTIONS

By submitting a proposal, your entity 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 31U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

## **8. RFP Terms and Conditions**

### **SOI reserves the right to:**

SOI reserves the right to accept or reject any and all proposals and/or bids if, in its sole discretion, doing so is in its best interest; rebid this RFP by requesting new proposals from qualified firms; waive or modify minor irregularities or inconsistencies in proposals received; engage in negotiations with proposers, within the requirements outlined in this RFP, to determine the best solution for the Solar Opportunities Indiana program; require proposers to submit modifications or additions to their proposals as a condition of further participation in the selection process; fund proposals in full or in part, at its discretion; decline to make an award at the conclusion of the evaluation process, with this RFP not to be construed as a guarantee that one or more proposers will be awarded contracts; adjust the RFP calendar dates for any reason deemed appropriate by SOI; contact proposers to clarify any portion of their submission; and amend or cancel this RFP at any time, for any reason, without liability or obligation to any proposer, with any modifications communicated to all known proposers in a timely manner.

### **Confidentiality & Conflict of Interest:**

The Proposer acknowledges that any data, materials, and information disclosed to the Proposer in connection with this project may contain confidential, proprietary, or legally protected information. The Proposer agrees that all such information gathered, accessed, or disclosed for the purpose of this project shall not be shared with, disclosed to, or discussed with any third party without the prior written consent of SOI. The Proposer further agrees to take all reasonable measures to protect the confidentiality and security of SOI's data, including compliance with applicable federal and state data protection laws.

**Conflict of Interest Disclosure:**

Proposers must disclose any existing or prior business, personal, or financial relationships with SOI members, board members, or affiliates within the past five years that could create a perception of bias or influence. This includes, but is not limited to, any relationships, financial interests, or affiliations that could be perceived as influencing the fairness and integrity of the procurement process. By submitting a proposal, the Proposer affirms that it has not provided, and does not intend to provide, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to any SOI employee, public official, or representative in connection with this procurement.

Failure to fully disclose a conflict of interest—whether intentional or unintentional—will result in immediate disqualification of the Proposer’s submission. If a conflict is discovered after a contract has been awarded, SOI reserves the right to terminate the contract immediately.

SOI has sole discretion in determining whether an actual or apparent conflict of interest exists and whether such a conflict may negatively impact SOI’s mission. An award will not be made where a conflict of interest is deemed inconsistent with SOI’s ethical and operational standards.

**Ownership:**

All costs incurred in the preparation and submission of the Proposal shall be borne solely by the Proposer. SOI shall not be responsible for any costs associated with the preparation, development, or submission of the Proposal. Any and all documents, reports, analyses, or other materials used or developed by the Proposer during the course of this project shall be made available to SOI upon request. Such materials shall become the exclusive property of SOI, and the Proposer shall not assert any copyright claims or other proprietary rights inconsistent with the full transfer of ownership to SOI. If this RFP results in a software-related contract, the Proposer acknowledges that all documents, reports, analyses, software configurations, or other deliverables developed by the Proposer during this project shall become the exclusive property of SOI upon creation. The Proposer shall not assert any copyright, trademark, or intellectual property claims inconsistent with SOI’s full ownership of such materials, except as explicitly agreed upon in writing by both parties.

Upon expiration or termination of the contract, the Proposer must securely export all SOI-owned data in a structured, industry-standard format that ensures seamless migration to another system. This data must be provided at no additional cost and remain fully accessible and usable. The Proposer is responsible for implementing appropriate security measures to protect SOI’s data from unauthorized access, disclosure, or loss throughout the transition process. Additionally, within 30 days of contract termination, the Proposer must provide written certification that all SOI data has been securely transferred and that no copies remain in its possession, unless otherwise authorized in writing by SOI. The Proposer must also offer reasonable technical assistance during the transition period to prevent any disruption to SOI’s program operations.