Hope Enterprise Corporation

Request for Proposals

Engineering Technical Assistance Services

Purpose of Engineering Technical Assistance RFP

Hope Enterprise Corporation (HEC) is seeking qualified engineering partners to provide technical assistance in support of HEC's financing of solar energy and battery storage projects for solar installers serving residential households and other commercial enterprises in Arkansas and Mississippi.

This RFP aims to identify partners capable of supporting HEC's mission to enhance financial health and wealth in historically under-resourced Deep South communities through renewable energy projects. The selected engineering partner(s) will play a crucial role in project underwriting, implementation, and long-term system monitoring – ensuring compliance with federal, state, and local laws and solar lending program requirements while maximizing outcomes and savings for the residential households and commercial enterprises served by the program.

Statement of Funding

This project is being supported, in whole or in part, by federal award number (FAIN) 84091501 and 84091401, both awarded to Hope Enterprise Corp. by the EPA.

Overview

HEC Solar for All Program

As a grantee of the Environmental Protection Agency's (EPA) Solar for All (SFA) program, HEC is committed to reducing electricity costs by at least 20% for residential households in low-income and disadvantaged communities (LIDACs). SFA will be central to HEC's commercial solar lending platform, but not all loans will be SFA-specific. For purposes of this RFP, respondents should address commercial solar financing generally, as there are no engineering-related parameters unique to SFA.

Solar Project Types and Cost Proposal Structure

HEC will deploy its Solar for All grants and other commercial solar lending resources by providing project financing to developers and/or owners of solar projects. The solar project types will include community solar, multifamily solar, and single-family residential solar leasing (i.e., not loans directly to households for residential solar). The chosen engineering partner(s) will primarily consult on community and multifamily solar projects, which will take the form of construction-to-permanent loans, ITC bridge loans, and, where applicable, unique SFA forgivable loans.

HEC would also like to consider proposals that include assistance for monitoring and auditing its residential solar leasing program as needed. Those installations will mostly be managed through a solar leasing partner and financed through a warehouse facility from which the leasing business may borrow to fund residential customer installations.

Scope of Work

The selected engineering partner(s) will provide a comprehensive range of technical assistance services to support project development, execution, and ongoing monitoring. Key responsibilities include:

1. **Technical Assessment of Projects During the Underwriting Phase (Front-End Due Diligence)**
    - Support system design evaluation, including solar layout & design, interconnection feasibility, and storage integration.
    - Evaluate sites, solar resource outputs, and developer-submitted technical studies.
    - Provide technical validation for project financial models, ensuring assumptions are realistic and within current market ranges.
    - Assessment of contractor and supplier selection, including qualification verification and compliance.
    - Advise HEC on appropriate construction and loan disbursement schedules based on the technical aspects of the project.
    - IREE certification for projects with energy-efficiency components
2. **Construction Phase Oversight**
    - Perform site inspections, approve draw packages, change orders, and updates to schedules of values.
    - Verify and sign off on construction milestones to ensure timely project execution.
    - Observe or conduct system testing upon project completion.
    - Advise HEC on appropriate capital reserve requirements at conversion to permanent/operational phase.
3. **Continued System Performance Monitoring and Ongoing Support**
    - Review system performance reports to ensure household savings and troubleshoot underperformance issues with HEC and/or the Sponsor.
    - Approve Operations and Maintenance (O&M) provider qualifications and selection and ensure plans align with long-term system viability.
    - Provide ongoing quality control support to HEC portfolio management staff.
    - Provide ongoing engineering and other energy audit services, e.g. spot checks of solar installations, to HEC staff to ensure compliance with program regulations, including household savings requirements.

Qualifications and Additional Offerings

Engineering Partner Qualifications

HEC seeks engineering partners with the following qualifications:

- Identify and provide professional qualifications for:

    - (a) at least one certified Professional Engineer (Electrical) who will serve as supervising engineer,
    - (b) all other certified Professional Engineers and their discipline(s), and
    - (c) each other staff member who may have responsibility for all or part of the above scope of work.
- For the respondent and the supervising P.E., a minimum of four years of experience serving as an independent engineer and/or owner's rep in commercial solar and storage project development.
    - *Experience in Arkansas and/or Mississippi will be highly valued.*
- Strong knowledge of local, state, and federal solar and storage regulations and requirements, as well as energy project finance products, modeling, and practices as they relate to technical aspects of project development.
- Specific experience in each aspect of the Scope of Work.

Additional Service Offerings

Firms with expertise in the following areas are encouraged to highlight these capabilities. If the above essential qualifications are met, experience in these additional service offerings will strengthen a respondent's proposal:

- Experience with project and interconnection design that complies with and maximizes the advantages of state-level net metering regime, grid interconnection processes, and behind-the-meter allowances.
- Integration of storage technologies with project design, microgrid projects, and, where applicable, access to ancillary service revenue.

Each additional service area must be accompanied by at least one specific project example demonstrating the firm's experience in that service area.

Response Components and Evaluation Criteria

RFP Response Instructions and Components

HEC requests that all proposal materials be sent via email in a single zip file to thelman.boyd@hope-ec.org and solarforall@hope-ec.org with the subject line: "Engineering Technical Assistance RFP Response - [Organization Name]".

Responses must be received no later than 5:00 p.m. U.S. Central Time on Friday, May 30, 2025. HEC reserves the right to extend the deadline or reopen the RFP if necessary.

A complete response must include the following components:

1. Executive Summary

- Brief overview of the firm's qualifications, expertise, and relevant project experience.

2. Technical Proposal
    - Narrative detailing the firm's approach to the outlined scope of work and, if applicable, additional services.
    - Description of personnel and their relevant experience.
    - Sample solar/storage assessment demonstrating capabilities.
        i. *Preference for sample projects that are behind-the-meter or net-metered, as grid-serving projects are less applicable to HEC's commercial solar lending generally and to the SFA program specifically.*
3. Cost Proposal
    - Budget with itemized cost breakdown for services, including per-project costs for:
        i. Underwriting support
        ii. Construction phase support
        iii. Continued system performance monitoring
    - Separate pricing for community solar, multifamily solar, and residential solar installation/leasing projects, if applicable.
        i. For community and multifamily solar, please state pricing on a per-project basis
        ii. For single-family residential solar projects, please state your approach to monitoring and auditing a leasing business with multiple projects. For example, how might you conduct spot checks on specific projects?
    - Capacity constraints for any services, e.g., technical review of residential rooftop proposals
    - Process for evaluating the cost of more ad hoc requests from HEC
    - Discounted rates for nonprofit or government projects, if applicable.
4. References
    - Contact information for at least three past clients from similar services.

Evaluation Criteria

Proposals will be evaluated based on the following weighted criteria:

- Technical Approach & Expertise (40%) – Ability to assist with technical aspects of underwriting, lender's rep and construction management, and monitoring performance.
- Past Experience (20%) – Demonstrated success in similar commercial solar and storage projects, particularly in the states of Arkansas and/or Mississippi.
- Capacity & Capability (20%) – Financial stability, key personnel qualifications, and sufficient staffing and the ability to manage multiple projects and project types and scale.
- Cost Proposal (20%) – Competitive pricing with preference for per-project payment structure and/or discounts for government or nonprofit owners.

Additional Requirements and Contact Information

Right to Reject

HEC reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP.

Additional Terms and Conditions

Any notice of award issued under this RFP will include additional terms and conditions. For example, a notice of award may include terms and conditions that require successful completion of HEC's loan origination process, which is not governed by this RFP and requires additional steps and negotiation of terms outside the scope of this RFP.

Any agreement with HEC shall include terms and conditions acceptable to HEC that define rights and remedies of the selected lessor and HEC as a result of the performance or non-performance of third-parties, such as EPA, under all applicable contracts and law.

Additional Requirements

DUNS and System for Award Management (SAM) Registration

All contractors receiving federal funds through Solar for All must have or obtain an active account in the System for Award Management (SAM). The website and information on how to create a user account is found at https://www.sam.gov/SAM/.

To receive payment from a federal 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 (Learn more here).

Additionally, please make sure that your sub-contractors who receive federal funds are aware that they must have a DUNS number and be registered in SAM in order to be in compliance with federal reporting requirements.

Federal Funding Accountability and Transparency Act (FFATA)

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

High Rate Limitation

HEC may not provide reimbursement for payment of the salary of a consultant at more than the daily equivalent of the rate paid for 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/2018/executive -senior-level. In order to verify this requirement is being met, HEC may require additional information regarding a breakout of direct and indirect expenses within budgets and rates.

Byrd Anti-Lobbying Certification

Selected respondents will be required to complete a certification form to ensure compliance with the Byrd Anti-Lobbying Amendment (31 CFR Part 21, 31 U.S.C. 1352). This requirement applies to contracts to nonfederal entities (recipients, subrecipients, and contractors) valued at more than $100,000 and which are funded, fully or partially, through any federal award, such as federal grants. With this form, contractors or subcontractors must certify and disclose their lobbying activity compliance. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure. See EPA Form 6600-06 for an example of the certification form.

Contact Information

For any questions related to this RFP, please contact solarforall@hope-ec.org.

HEC looks forward to reviewing proposals from qualified engineering partners who share our vision of expanding renewable energy access and improving economic opportunities in underserved communities.