



PROGRAMS
ADMINISTRATION
GAS AND OIL
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RESOURCES
MINED LAND REPURPOSING
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COAL MINE SAFETY
OFFSHORE WIND
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COMMONWEALTH OF VIRGINIA

Virginia Department of Energy

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www.energy.virginia.gov

Request For Proposals

Issue Date: April 22, 2025

RFP#: 2025SEO01

Title: Administration of Virginia Solar for All Single-Family and Multi-Family Sub-Programs

Commodity Codes: 91832, 91841, 96156

- ☐ **SBSD-certified micro business set-aside award priority**
- ☐ **SBSD-certified small business set-aside award priority**

Issuing Agency:

Commonwealth of Virginia
Virginia Department of Energy
1100 Bank Street, 8th Floor
Richmond, Virginia 23219

Project Location: 1100 Bank Street, Richmond Virginia, 23219.

Period of Contract: From Date of Award Through termination of the contract.

MANDATORY PREPROPOSAL CONFERENCE: A mandatory preproposal conference will be at 1:00 PM Eastern Time (ET), May 1st, 2025 on Microsoft Teams ([Meeting Link](#): Meeting ID: 253 602 857 123; Passcode: nR78Q7wn. Dial in by phone: +1 434-230-0065, 699988075#; Phone conference ID: 699 988 075#).

Offerors should [register here for the conference](#), and registration will close at 5:00 PM ET, April 31st, 2025.

The purpose of this conference is to allow potential Offerors an opportunity to present questions about this Request for Proposals (RFP). Due to the importance of all Offerors having a clear understanding of the scope of

work and requirements of this solicitation, **attendance at this conference will be a prerequisite for submitting a proposal.** Proposals will only be accepted from those Offerors who are represented at this preproposal conference. No one will be admitted after 1:05 PM ET.

Proposals for providing services described herein will be received until 12:00 PM ET on May 30th, 2025.

PROPOSALS MUST BE SUBMITTED ELECTRONICALLY ON eVA (eva.virginia.gov).

All information provided in this proposal is subject to the Freedom Of Information Act (FOIA). If any part of your proposal contains confidential or proprietary information, please submit a redacted copy along with your proposal to ensure compliance with FOIA requirements.

All inquiries related to this RFP should be directed to Jennifer Dillemath jennifer.dillemath@energy.virginia.gov by 12:00 PM ET on May 6th, 2025. Questions (worded as submitted to Virginia Energy) and answers will be published as an addendum to this RFP on the eVA webpage where this RFP is posted.

In compliance with this RFP and all conditions imposed in this RFP, the undersigned firm hereby offers and agrees to furnish the services required by this RFP at the prices indicated in the proposal schedule, and the undersigned firm hereby certifies that all information provided below and any schedule attached hereto is true, correct, and complete.

Virginia Contractor License No. _____
Specialty Codes: _____
DSBSD – Certified Small Business No. _____

Class: _____
eVA Vendor ID #: _____
FEI/FI No.: _____

Name and Address of Firm:

By: _____
(Signature in Ink)

Date: _____

Name: _____
(Please Print)

Title: _____

Email Address: _____

FAX No: (____) _____ Telephone No. _____

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment. Faith based organizations may request that the issuing agency not include subparagraph 1.f in General Terms and condition C. Such a request shall be in writing and explain why an exception should be made in that invitation to bid or request for proposal.

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1. Purpose and Background

Virginia Energy seeks one to two Contractors to serve as program administrators for two sub-programs of the Virginia Solar for All program: Single-Family Solar and Multi-Family Solar Plus Storage. **Offerors can submit applications to one or both sub-programs. Virginia Energy may award multiple contracts as a result of this RFP.**

The Contractor will support Virginia Energy in finalizing a Virginia Solar for All program design that meets federal requirements and further the Commonwealth's policy objectives, implementing the Virginia Solar for All program until fund exhaustion, and preparing all applicable reporting and compliance materials. The Virginia Solar for All program will require ongoing federal reporting, community engagement, and collaboration with local partners to maximize its impact throughout Virginia.

The federal Solar for All program is a grant competition under the Greenhouse Gas Reduction Fund, a \$7 billion initiative under the U.S. Environmental Protection Agency (EPA) aimed at expanding access to affordable, resilient, and clean solar energy for low-income households and communities. The program seeks to provide funding to states, territories, Tribal governments, municipalities, and eligible nonprofit organizations to establish or expand solar programs that lower energy costs, create economic opportunities, and advance access to clean energy.

On June 28, 2023, the EPA issued guidance outlining the program requirements and the application process for the Solar for All initiative. The guidance specifies that awarded entities must ensure that program benefits are directed toward reducing energy costs, improving consumer protections, and increasing access to solar energy for households facing high energy burdens. As part of the program, EPA requires that funded initiatives deliver Meaningful Benefits, including at least 20% electric bill savings for participating households, service to households earning less than 80% of the Area Median Income (AMI), measurable emissions reductions, diverse solar ownership models, and improved grid resilience through solar plus storage solutions. EPA is developing detailed guidance on projecting and monitoring the 20% bill savings target for participants, which will be shared once published.

On behalf of the Commonwealth of Virginia, Virginia Energy has been awarded \$156 million under the Solar for All program. With this funding, Virginia Energy will establish Virginia Solar for All, a state-level program to expand solar access for eligible households, reduce energy burdens, support a ready workforce, and create a foundation for the future of affordable and innovative residential-serving solar initiatives.

Virginia Solar for All comprises several sub-programs to maximize resident accessibility and impact. Based on Virginia Energy's current EPA-approved workplan, high-level information for the sub-programs most relevant to this RFP are as below.

- **Sub-Program 1: Single-Family Solar:** Funding will support the expansion of rooftop solar installations for individual homeowners, directly lowering energy costs. Single-Family Solar includes two categories of financial assistance. Grants will be issued to installers/contractors or another business entity, not homeowners directly.
 - Single-Family Direct Owned (SF-DO)
 - \$24M in grants to subsidize solar systems owned by eligible households
 - \$5M in grants for enabling upgrades necessary for solar systems owned by eligible households

- Single-Family Third Party Owned (SF-TPO)
 - \$16M in grants to subsidize solar systems owned by a third party
 - \$5M in grants for enabling upgrades necessary for solar systems owned by a third party
- **Multi-Family Solar Plus Storage:** Funding will facilitate the deployment of on-site solar at eligible multi-family affordable housing properties, ensuring broader access for both renters and building owners. There are four categories of financial assistance available under this sub-program.
 - \$4.8M in pre-development technical assistance grants
 - \$28M in a revolving loan fund for solar system costs
 - \$5M in grants for enabling upgrades
 - \$8M in grants for battery storage in conjunction with select solar projects

In addition to the sub-programs addressed in this RFP, Virginia Solar for All also includes a Community/Shared Solar program, a Grid Infrastructure and Improvement Fund, and a Solar Workforce program. Further details on EPA-approved plans for Virginia Solar for All can be found in [Virginia Energy's published workplan](#).

Virginia Solar for All officially began its planning period in December 2024, and the planning period will conclude in December 2025. Program implementation will begin in December 2025, and all funds should be expended by the end of 2029.

In accordance with the Commonwealth of Virginia's Agency Procurement and Surplus Property Manual, this RFP uses the term "Offeror" to describe the person/firm who submits a response to the RFP and the term "Contractor" to describe the person/firm who is to perform the requirements of the contract after award. The Contractor will be a contractor, as defined in 2 CFR 200 Subpart D, for the purposes of federal awards.

2. Statement of Needs

Virginia Energy seeks program administration support for the Single-Family Solar and Multi-Family Solar Plus Storage sub-programs of Virginia Solar for All. **Offerors may submit a proposal for one or both of the following sub-programs:**

Sub-Program 1: Single-Family Solar

Virginia Energy seeks an administrator for Virginia Solar for All's Single-Family Solar sub-program, which will assist single-family households by providing grants to lower overall costs for system installation and to cover the cost of essential enabling upgrades (roof replacement, electrical system upgrades, tree trimming, or health and safety upgrades necessary to complete solar installations).

The Contractor will intake customers to determine income eligibility and solar viability, and then solicit project quotes from verified solar Engineering, Procurement and Construction (EPC) contractors for the project. The Contractor will then compile financing options for the project from verified financing partners based on solar EPC contractor quotes.

The Contractor will provide a compiled Solar Proposal to a resident with their project ownership and financing options. The Contractor will provide hands-on support to customers as they navigate their options in terms of installer and financing options, savings estimates, tax implications, and Solar Renewable Energy Credits

(SRECs). After selecting a solar EPC, the selected solar EPC will conduct an on-site assessment and identify any need for enabling upgrades, which would require the Contractor connecting the resident to a verified enabling upgrade contractor.

Virginia Energy anticipates offering a standard solar grant incentive amount and a variable system size. The intent is to reduce administrative burden and expense by simplifying program offerings while continuing to provide requisite savings to consumers. Depending on additional analysis, current utility rates, savings guidance from EPA, and price per watt offered by the market, Virginia Energy may need to pivot to variable incentives, fixed system sizes and/or adjust incentive levels.

Virginia Energy intends for households located in designated disadvantaged communities (DACs) with up to 100% AMI to be eligible for the Single-Family sub-program, pending approval of Virginia Energy's DAC definition.

The scope of services includes but is not limited to the tasks outlined below, broken into Part A and Part B.

Part A: Planning Period Tasks

Tasks in this section should be completed by December 1st, 2025.

1. Management of communications with Virginia Energy, including reporting and compliance support
 - a. Conduct weekly status meetings and ad-hoc meetings as needed, maintain program schedules, progress trackers, and shared folders and documents.
2. Development of a state-wide network of solar EPC and enabling upgrade contractors.
 - a. Development of contractor participation application and guidelines, including but not limited to: code of conduct, participation requirements, payment processes, reporting requirements, ongoing monitoring protocol, and consequences for noncompliance with program guidelines. The contractor participation guidelines must have robust consumer protections beyond compliance with Virginia Consumer Protection Law, including industry standard best practices.
 - i. Requirements for solar EPCs should include but not be limited to: quality equipment, affordable price per watt, labor and workmanship warranties, system monitoring, local offices and in-house installation crews, permitting and customer service departments, licensing and insurance, maintenance of a positive Better Business Bureau (BBB) rating, and a workforce hiring plan. Solar installers should be encouraged to provide homeowners with a third-party certificate that shows the value add of the solar asset and additional energy-related upgrades.
 - ii. In situations when solar EPCs are unable to service enabling upgrades, enabling upgrades contractors may be required. Requirements for enabling upgrades contractors should include but not be limited to: quality installations, industry standard warranties where applicable, local offices and crews, permitting and customer service departments, licensing and insurance, maintenance of a positive Better Business Bureau (BBB) rating.
 - b. Network of solar EPCs and enabling upgrade contractors should be able to provide service to all

of Virginia.

3. Development of a network of financial partners that will provide affordable solar loans, leases, and power purchase agreements to finance upfront costs of system installation.
 - a. Development of financial partner participation guidelines, including ongoing monitoring protocol, and consequences of noncompliance with program guidelines.
 - i. Solar loans should offer competitive interest rates, no pre-payment penalties, fixed rates, and no-cost transferability. Loans should clearly state the annual percentage rate (APR) and not be inflated by dealer fees. Lenders must assess ability to pay, but not necessarily through traditional approaches to underwriting.
 - ii. Third party ownership models should provide service warranties, reasonable buyout options, and equipment removal at end of term.
4. Establishment of an implementation platform that connects consumers, Solar EPCs, and financial partners. Features should include but are not limited to:
 - a. An online portal and associated staff required to intake customer applications and determine income eligibility.
 - b. Capacity to securely collect relevant data from customer and share with solar EPCs, who will use data to create solar designs and associated quotes.
 - c. Ability to solicit quotes from financial partners to for loan and third-party ownership financing options for associated quotes.
 - d. Collection and delivery of Solar Proposals for customers that compile contractor quotes and associated financing options and other relevant information in a clear, concise manner. A Solar Proposal should include but is not limited to:
 - i. Explanation of how net metering works
 - ii. Solar quotes from relevant EPCs which should include details on: system design, financing/ownership options, projected savings estimates, labor and roof penetration warranties, and equipment. Each EPC's quote should include relevant branding and a short blurb describing the company.
 - iii. Guidance on system insurance
 - iv. Sufficient documentation on the investment tax credit (including links to official government agency websites) for the customer to perform their own due diligence on their eligibility.
 - v. Description of expected project timeline
 - vi. Description of process of transferring solar to a new homeowner if customer sells their home
 - e. Phone support to help customers navigate their Solar Proposal and answer any associated questions.
 - f. Ability to connect customer with their chosen Solar EPC and financial provider once they have made their decision
 - g. Ability to connect customers eligible for enabling upgrade grant funding to verified enabling upgrade contractors.
 - h. Infrastructure and channels of communication needed to manage project pipeline in order to ensure that Virginia Solar For All projects maintain industry standard timelines.

- i. Cybersecurity infrastructure to store and secure all consumer personally identifiable information (PII) necessary for program administration and ensure that access to individual records is on a need-to-know basis. Virginia Energy will not store any PII on agency or Commonwealth servers.
 - j. Alternative intake and support for customers without internet access or technological literacy.
 - k. Ongoing phone and email support for customers and contractors.
5. Collaboration with Virginia Energy to hold program design validation workshops to inform final program design decisions (including incentive levels), ensuring the program meets or exceeds Solar for All meaningful benefits and consumer protection requirements.
 6. Development of a Marketing, Education and Outreach (MEO) strategy for the Single-Family Solar sub-program. Virginia Energy anticipates that the majority of Virginia Solar for All MEO will be conducted through Virginia Energy's Virginia Energy Connect (VEConnect) program, a forthcoming "one-stop-shop" for connecting Virginia's consumers and contractors with clean energy programs, including those incentivizing solar, energy efficiency and demand response, energy storage, and electric vehicles. Virginia Energy will channel up to \$4.5M for Virginia Solar for All MEO through VEConnect over the performance period, with the majority of efforts dedicated to reaching single-family homeowners and renters. Offerors should propose supplemental MEO.

Part B: Implementation Period Tasks

The Contractor will conduct the following tasks on an ongoing basis once the planning period concludes and through the end of the program. Successful completion of Part A tasks unlocks funding to begin Part B. The Contractor will report on activities and invoice monthly.

1. Management of communications with Virginia Energy, including reporting and compliance support.
 - a. Weekly status meetings and ad-hoc meetings as needed, maintenance of program schedules and progress trackers, and shared folders and documents.
 - b. Completion of spot checks of customer's post solar bills and asset performance to ensure that savings targets are being met. Virginia Energy anticipates this number to be 5% of overall systems, dependent on final program design. Adjustment of program as needed to address performance issues.
 - c. Collection of data required for EPA's Semi-Annual, Final and Transaction and Project-Level Reporting (see details in Section 5).
2. Management and continuous improvement of implementation platform throughout implementation period.
3. Management of a verified solar EPC and enabling upgrade contractor network, including but not limited to: vetting and on-boarding of new verified solar EPCs/enabling upgrade contractors, ongoing monitoring of performance of verified solar EPCs/contractors, including taking corrective action as needed per program guidelines.
4. Management of financial partners, ensuring that customers continue to receive the lowest cost financing available throughout period of performance.
5. Management and disbursement of solar and enabling upgrade grant funding available under the Single-

Family Solar sub-program.

6. Execution of MEO plan to reach eligible customers throughout the state.
7. Collaboration with Virginia Energy to hold periodic public meetings and meetings with key stakeholders to inform ongoing program improvement. The Contractor and Virginia Energy will re-assess incentive levels at the beginning of program years two and four.
8. Virginia Energy anticipates that Davis Bacon and Related Acts (DBRA) and Build America Buy America (BABA) will not apply for the Single-Family Solar sub-program, as the program will be designed to give consumers choice of contractor(s) and consumers will enter directly into contracts. However, if there is a case where DBRA or BABA are applicable, the Contractor will be responsible for collecting and reporting the required information to Virginia Energy (including payroll validation and site visits required to comply with DBRA).

Sub-Program 2: Multi-Family Solar Plus Storage (MF-SPS)

The federal Solar for All program guidelines defines program eligibility for “multi-family affordable housing”. This definition includes:

1. Non-profit or tax-exempt owners of housing properties with four or more residential units and rents not exceeding 30% of 80% AMI for at least half of residential units and with an active affordability covenant from an approved federal or state housing assistance program.
2. Non-profit or tax-exempt owners of unsubsidized affordable housing with four or more units and rents not exceeding 30% of 80% AMI for at least half of residential units.

Use of “multi-family” in this RFP refers to this Solar for All-eligible multi-family affordable housing.

Virginia Energy seeks an administrator to manage and disburse \$4.8M in pre-development grants, \$5M in enabling upgrade grants, and \$8M in battery storage grants as well as a \$28M revolving loan fund for on-site solar at multi-family properties. Virginia Energy anticipates that the MF-SPS program will allow up to 20% of the financial assistance for an individual project to be used for enabling upgrades such as roof replacement, electrical system upgrades, tree trimming, or health and safety upgrades necessary to complete solar installations. Grant amounts are based on Virginia Energy’s current EPA-approved workplan and subject to change per final program design. The scope of services includes but is not limited to the tasks outlined below, broken into Part A and Part B.

Part A: Planning Period Tasks

Tasks in this section should be completed by December 1st, 2025.

1. Management of communications with Virginia Energy, including reporting and compliance support
 - a. Conduct weekly status meetings and ad-hoc meetings as needed, maintain program schedules, progress trackers, and shared folders and documents.

2. Development of a Marketing, Education and Outreach (MEO) strategy for the MF-SPS program. The MEO strategy will be implemented in coordination with Virginia Energy's Virginia Energy Connect (VEConnect) program, a forthcoming "one-stop-shop" for connecting Virginia's consumers and contractors with clean energy programs. The Contractor will support Virginia Energy in informing Virginia Solar for All participants about other energy related program, such as energy efficiency rebate and demand response programs. The Contractor will also raise awareness about the possible benefits of a third-party certificate showing the value add of the solar asset and additional energy-related upgrades.
3. Collaboration with Virginia Energy to hold program design validation workshops to inform final program design decisions (including incentive levels), ensuring the program meets or exceeds Solar for All meaningful benefits and consumer protection requirements. MF-SPS program design will need to account for special considerations for master-metered multi-family properties, including requirements to ensure property owners are delivering sufficient benefits to residents in compliance with U.S. Department of Housing and Urban Development (HUD) guidance.
4. Development of secure platform, guidelines, and all required tools and documents required for managing applications and disbursement of grants for pre-development, enabling upgrades, and battery storage as well as a revolving loan fund for solar. All guidelines should further the goal of ensuring high quality solar and battery storage systems and continued energy resiliency and savings for customers, including maintenance warranty requirements for participating contractors. The Contractor must confirm eligibility for all participating properties via robust income verification and collect requisite data for reporting and compliance.

Part B: Implementation Period Tasks

The Contractor will conduct the following tasks on an ongoing basis once the planning period concludes and through the end of the program. Successful completion of Part A tasks unlocks funding to begin Part B. The Contractors will report on activities and invoice monthly.

1. Management of communications with Virginia Energy, including reporting and compliance support
 - a. Conduct weekly status meetings and ad-hoc meetings as needed, maintain program schedules and progress trackers, and maintain shared folders and documents.
 - b. Completion of spot checks of residents' post solar bills and asset performance to ensure that savings requirements are being met. Virginia Energy anticipates this number to be 5% of overall systems, dependent on final program design.
 - c. Collection of data required for EPA's Semi-Annual, Final and Transaction and Project-Level Reporting (see details in Section 5).
2. Management of pre-development grant fund, including application intake, eligibility verification, due diligence, and negotiation of grant documents.
3. Management of solar revolving loan fund, including application intake, eligibility verification, due diligence and underwriting, and negotiation and execution of financing documents. Note that all program income from loan-based offerings will return to the loan fund and continue to be deployed under the same guidelines. The Contractor must use grant funds prior to using any program income generated by the revolving loan fund.

4. Management of grant funds for enabling upgrades deployed as necessary to enable solar projects, including application intake, eligibility verification, due diligence, and negotiation of grant documents.
5. Management of grant funds for battery storage systems deployed in conjunction with select solar projects, including application intake, eligibility verification, due diligence, and negotiation of grant documents.
6. Infrastructure and channels of communication needed to manage project pipeline, ensuring that Virginia Solar For All projects maintain industry standard timelines and are funded before program closeout.
7. Implementation of MEO strategy to spur demand for MF-SPS sub-program financial support.
8. Collaboration with Virginia Energy to hold periodic public meetings and meetings with key stakeholders to inform ongoing program improvement. The Contractor and Virginia Energy will re-assess incentive levels at the beginning of program years two and four.
9. Virginia Energy anticipates that there will be a subset of projects supported by the MF-SPS program that require compliance with DBRA and/or BABA. Virginia Energy estimates 10 projects or less will be subject to these requirements. The Contractor must evaluate whether these and other laws (including the National Environmental Policy Act, National Historic Preservation Act, and local permitting) apply to each project under consideration as well as collect and report the required information to Virginia Energy (including payroll validation and site visits required to comply with DBRA). Complete guidance from EPA on DBRA compliance for Solar for All is forthcoming.
10. Collaboration with Virginia Energy in developing a strategy for use of remaining program income at project close-out.

3. Proposal Preparation and Submission Instructions

Offerors may submit a proposal for administration of one or both of the following sub-programs.

Sub-Program 1: Single-Family Solar

Offeror's proposal in response to this RFP must comply with the following requirements:

1. Proposals should be **no longer than 25 pages**, including all information requested below, unless otherwise indicated. The page limit does not include the RFP cover.
2. All pages must be formatted to fit on 8.5- by 11-inch paper with margins not less than ½ inch on every side.
3. Use Times New Roman typeface, a black font color, and a font size of 12 point or larger (except in figures or tables, which may be 10-point font).
4. References must be included as footnotes or endnotes in a font size of 10 or larger. Footnotes and endnotes are counted toward the maximum page requirement.
5. Page numbers must be included in the footer of every page.

Offerors shall provide the following information in proposals. Please organize information in the way it is requested to aid in efficient and fair evaluation.

Section 1: History, Qualifications, and Experience

- **Cover Page:** Include a cover page with your organization’s EIN, unique entity identifier (UEI) from SAM.gov, and primary contact.
- **Company Information:** Provide background on your company, including size, location, areas of operation, a narrative of company history, business model, and experience with administering comparable state or federal energy or solar programs. Describe your organization’s experience working with energy programs serving low-income single-family households. Describe your organization’s experience with complying with federal guidelines and data privacy regulations, and disclose any history of regulatory violations, non-compliance, or fraud.
- **Personnel & Qualifications:** Provide an overview of your team, including current role, responsibilities, and relevant experience.

Section 2: Program Management Proposal

- **Customer Narrative** – Provide a hypothetical customer journey, from hearing about the program through MEO to getting solar on the roof.
- **Application Portal:** Provide an operational approach to creating a secure online portal capable of intaking applications, verifying income eligibility, assessing solar site viability, connecting eligible consumers with Solar EPCs, financial providers, and enabling upgrade contractors, and deploying program financial assistance for solar as well as enabling upgrades. Describe how the application intake process would be supported for customers with no internet access or low technological literacy.
- **Solar EPC and Enabling Upgrade Contractor Network:** Provide anticipated process for vetting and approving Solar EPCs and enabling upgrade contractors required to service the program. Describe desired standards from each group of these verified program partners and methods for vetting contractor quality during hiring process and program implementation.
- **Financial Partners:** Provide a process for vetting and approving financial partners required to finance loans in the case of direct ownership or PPAs/Leases for customers choosing a third-party ownership model. Include standards to be required from both the financial organizations and the products they offer.
- **Customer Support/Solar Proposal:** Describe an approach to guiding customers through their solar options that balances sufficient education to ensure an informed decision and simplicity to ensure adoption. Describe process for delivery and communication.
- **Project Pipeline Management:** Provide a plan for high level oversight of projects in the Solar for All pipeline, including involved software and personnel.
- **Compliance, Reporting, and Savings:** Provide a plan to set up systems to receive relevant data from solar EPCs, financial providers, enabling upgrade contractors, and other partners for purposes of meeting EPA’s reporting guidelines as well as method used to spot check customers’ bills to determine if savings goals are being met.
- **Marketing, Education, and Outreach:** Provide a high-level overview of what would be included in the Marketing, Education and Outreach Strategy.
- **Organizational Capacity:** Describe your plan for scaling up organizational capacity (staffing, software, and other resources) to deliver on the Statement of Needs described herein.
- **Risk Mitigation:** Describe three risks to successful implementation to be expected and how the proposed delivery model addresses them.

Pricing Schedule

Virginia Energy is interested in understanding type and level of costs for program delivery. Considering this,

the Offeror shall:

1. Submit a Pricing Schedule in the format provided in Attachment 7 - Pricing Schedule (a) - Single-Family. Populate the “Deliverables/Tasks” column to include deliverables/tasks involved in achieving the milestone listed in the corresponding “Milestone” column. The excel file is not included in the 25-page proposal page limit.
2. Administration milestones in the Pricing Schedule are listed twice, once for Single Family Direct Ownership (SF-DO) and once for Single-Family Third-Party Ownership (SF-TPO) because Virginia Energy’s EPA-approved budget includes separate line items for the SF-DO and SF-TPO sub-programs. The Contractor will need to separately track and invoice Virginia Energy for expenses for each sub-program. They are otherwise combined in this RFP for administrative efficiency and streamlined consumer experience.
3. In addition to populating the pricing schedule, describe program design decisions that significantly impact total cost to deliver the Statement of Needs.

Virginia Energy understands that pricing will depend in part on program design decisions that are yet to be made and requests pricing schedules reflecting the overall approach outlined in the proposal.

Costs must be allowable, allocable, and reasonable in accordance with the applicable Federal cost principles referenced in 2 CFR 200. The cost principles for commercial organizations are in Federal Acquisition Regulation (FAR) Part 31.

Offerors who submit a proposal in response to this RFP may be invited to give an oral presentation, with visual aids, in person or virtually. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact finding and explanation session only and will not include negotiation. Virginia Energy will schedule the time and location of any such presentations.

Negotiations shall be conducted beginning with the Offeror ranked first in accordance with the Evaluation Criteria of this RFP. If a contract is satisfactory and advantageous to the agency, the agency can negotiate a price that is considered fair and reasonable to the agency, and award made to that Offeror. Otherwise, negotiations conducted with the Offeror ranked first shall be formally terminated and negotiations conducted with Offeror ranked second, and so on until a contract can be negotiated at a fair and reasonable price. (Code of Virginia: Title 2.2 Administration of Government. Chapter 43. Virginia Public Procurement Act. 2.2-4302.2 Process for Competitive Negotiations)

Attachments (not included in 25-page limit):

Please also provide the following as attachments to your proposal:

- One-page resumes for up to five key personnel proposed to work on the project along with a description of their role, including whether that role is temporary or through the end of contract.
- At least three, and up to five, professional references from private, state or federal organizations with whom you have completed similar projects. Include contact information and a brief description of the work performed.
- A sample Solar Proposal for a resident that presents information described in Statement of Needs. Should be no longer than four pages.
- A statement of financial stability for the Offeror or an equivalent from a financial institution showing financial stability.
- If the Offeror is a DSBSD-certified small business, indicate such in Section A of Attachment 5, Small

Business Subcontracting Plan. If the Offeror is not a DSBSD-certified small business, the Offeror is required to identify which portions of the requirement is planned to subcontract to DSBSD-certified small businesses by completing and returning Section B of Attachment 5. All subcontractors must be vetted and eligible to receive federal funds prior to any subcontracting agreement being signed. Supporting documentation must be submitted to Virginia Energy prior to any subcontracting agreement being signed.

- Confirmation that if selected as the Contractor, the Offeror can provide a System and Organization Control 2 report, with audit reports on their internal controls. Reports should comply with the Virginia IT Agency's (VITA) policies on IT Information Security Policy: Section 519, Prohibited Hardware Software and Services Policy and Section 528, and information security standards. Any subcontractor handling program data must also provide a SOC 2 report or other type of data audit report.
- Proprietary/Confidential Information Identification Form (Attachment 4)
- State Corporation Commission Form (Attachment 6)

Sub-Program 2: Multi-Family Solar Plus Storage

Offeror's proposal in response to this RFP must comply with the following requirements:

1. Proposals should be **no longer than 25 pages** including all information requested below, unless otherwise indicated. The page limit does not include the RFP cover.
2. All pages must be formatted to fit on 8.5- by 11-inch paper with margins not less than ½ inch on every side.
3. Use Times New Roman typeface, a black font color, and a font size of 12 point or larger (except in figures or tables, which may be 10-point font).
4. References must be included as footnotes or endnotes in a font size of 10 or larger. Footnotes and endnotes are counted toward the maximum page requirement.
5. Page numbers must be included in the footer of every page.

Offerors shall provide the following information in proposals. Please organize information in the way it is requested to aid in efficient and fair evaluation.

Section 1: History, Qualifications, and Experience

- **Cover Page:** Include a cover page with your organization's EIN, unique entity identifier (UEI) from SAM.gov, and primary contact.
- **Company Information:** Provide background on your company, including size, location, areas of operation, a narrative of company history, business model, experience with clean energy lending, and administering comparable state/federal energy or solar programs. Describe your experience working with energy programs serving multi-family affordable housing. Describe your organization's experience with complying with federal guidelines and data privacy regulations, and disclose any history of regulatory violations, non-compliance, or fraud.
- **Personnel & Qualifications:** Provide an overview of your team, including roles, responsibilities, and relevant experience.

Section 2: Program Management Proposal

- **Project Narrative:** Provide two alternative narratives of a hypothetical MF-SPS project from project

origin to Permission to Operate from the utility. The second narrative should highlight differences from the first (e.g., solar ownership structure). Narratives can follow the order presented here or an alternative as Offeror sees fit. Narratives should include but are not limited to:

- **Project Initiation:** Who or what is driving initial interest in project? Who is bringing the project to the Contractor?
 - **Project Eligibility:** Describe a hypothetical affordable housing property and how its eligibility against Virginia Solar for All guidelines would be determined.
 - **Pre-Development:** Describe a hypothetical Pre-Development Technical Assistance contractor, the services they offer, how they would be vetted by the Contractor.
 - **Battery Storage Grants:** Describe how the project would be assessed for battery storage needs, who is providing project site due diligence and how these battery needs would be evaluated, paid for, and completed.
 - **Ensuring Savings:** Describe how hypothetical project would be evaluated, including against ability to provide requisite savings for tenants while staying in compliance with HUD guidance and without disrupting tenants' eligibility for receiving other government benefits. Include description of how tenants and property owners are involved with the decision making on savings options.
 - **Project Funding:** Describe a complete approach to funding the solar project and any approved enabling upgrades, including opportunities to leverage private and other public funding/financing sources.
 - **Solar and Storage EPCs:** Describe the Contractor's interaction with Solar and Storage EPCs to ensure project success.
 - **Project Pipeline:** Describe the Contractor's high-level overview of project pipeline management.
 - **Reporting Data:** Describe how relevant data for Virginia's Energy's reporting to EPA would be collected and delivered.
-
- **Marketing, Education and Outreach:** Provide a high-level overview of what would be included in the MEO Outreach Strategy and how it would spur program demand through close coordination with public agencies, non-profit organizations, and financial institutions that have longstanding relationships with multi-family affordable housing developers and owners.
 - **Program Design Workshops:** Describe approach to program design validation workshops and how they would inform final program design decisions.
 - **Pre-Development Grants:** Describe method, software, and staff involved in processing Pre-Development grant applications.
 - **Revolving Loan Fund Management:** Describe capacity and method for managing a revolving loan fund for solar development for existing and new multi-family housing owned by different categories of owners (government, LIHTC developers, nonprofit, etc). Options should include direct ownership and third-party ownership pathways. Offeror should propose a loan fund design that complements and integrates with, as possible, current financing arrangements used by housing developers and owners.
 - **Enabling Upgrades Grants:** Describe approach to managing enabling upgrade funds.
 - **Battery Storage Grants:** Describe approach to managing battery storage funds.
 - **Compliance Management:** Describe what potential federal regulations will apply to a sub-set of projects including but not limited to: BABA, DBRA, and the National Environmental and National Historic Preservation Act. Describe approach to managing compliance for each instance of regulation.
 - **Pipeline Management:** Describe method, staff, and software used in order support application process and provide high level project pipeline.

- **Risk Mitigation:** Describe three risks to successful implementation to be expected and how the proposed delivery model addresses them.

Pricing Schedule

Virginia Energy is interested in understanding type and level of costs for program delivery. Considering this, the Offeror shall:

1. Submit a Pricing Schedule in the format provided in Attachment 8 - Pricing Schedule(b) - Multi-Family. Populate the “Deliverables/Tasks” column to include deliverables/tasks involved in achieving the milestone listed in the corresponding “Milestone” column. The excel file is not included in the 25-page proposal page limit.
2. In addition to populating the pricing schedule, describe program design decisions that significantly impact total cost to deliver the Statement of Needs.

Virginia Energy understands that pricing will depend in part on program design decisions that are yet to be made and requests pricing schedules reflecting the overall approach outlined in the proposal.

Costs must be allowable, allocable, and reasonable in accordance with the applicable Federal cost principles referenced in 2 CFR 200. The cost principles for commercial organizations are in Federal Acquisition Regulation (FAR) Part 31.

Offerors who submit a proposal in response to this RFP may be invited to give an oral presentation, with visual aids, in person or virtually. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact finding and explanation session only and will not include negotiation. Virginia Energy will schedule the time and location of any such presentations.

Negotiations shall be conducted beginning with the Offeror ranked first in accordance with the Evaluation Criteria of this RFP. If a contract is satisfactory and advantageous to the agency, the agency can negotiate a price that is considered fair and reasonable to the agency, and award made to that Offeror. Otherwise, negotiations conducted with the Offeror ranked first shall be formally terminated and negotiations conducted with Offeror ranked second, and so on until a contract can be negotiated at a fair and reasonable price. (Code of Virginia: Title 2.2 Administration of Government. Chapter 43. Virginia Public Procurement Act. 2.2-4302.2 Process for Competitive Negotiations)

Attachments (not included in 25-page limit):

Please also provide the following as attachments to your proposal:

- One-page resumes for up to five key personnel proposed to work on the project along with a description of their role, including whether that role is temporary or through the end of contract.
- At least three, and up to five, professional references from private, state or federal organizations with whom you have completed similar projects. Include contact information and a brief description of the work performed.
- A statement of financial stability for the Offeror or an equivalent from a financial institution showing financial stability.
- If the Offeror is a DSBSD-certified small business, indicate such in Section A of Attachment 5, Small Business Subcontracting Plan. If the Offeror is not a DSBSD-certified small business, the Offeror is

required to identify which portions of the requirement is planned to subcontract to DSBSD-certified small businesses by completing and returning Section B of Attachment 5. All subcontractors must be vetted and eligible to receive federal funds prior to any subcontracting agreement being signed. Supporting documentation must be submitted to Virginia Energy prior to any subcontracting agreement being signed.

- Confirmation that if selected as the Contractor, the Offeror can provide a System and Organization Control 2 report, with audit reports on their internal controls. Reports should comply with the Virginia IT Agency's (VITA) policies on IT Information Security Policy: Section 519, Prohibited Hardware Software and Services Policy and Section 528, and information security standards. Any subcontractor handling program data must also provide a SOC 2 report or other type of data audit report.
- Proprietary/Confidential Information Identification Form (Attachment 4)
- State Corporation Commission Form (Attachment 6)

4. Evaluation Criteria

Proposals for individual sub-programs will be evaluated against the evaluation criteria as follows, with each evaluation criterion weighted a certain number of points, as indicated. Each Offeror may earn a maximum of 100 points per sub-program proposal.

Sub-Program 1: Single-Family Solar

Evaluation Category	Points Allocated
History, Qualifications and Experience Proposals will be evaluated on the Offeror's and associated staff's demonstrated capabilities, references and experience with working and complying with state and federal energy programs, solar installation, energy efficiency, building and maintaining contractor networks, experience in LI customer serving programs, and relevant financial products as well as Offeror's statement of financial stability.	35 Points
Program Management Proposal Proposals will be evaluated on the clarity and effectiveness of offerors consumer narratives and sample Solar Proposal as well as approach to managing application portal, program design workshops, network of Solar EPCs and financial providers, project eligibility, enabling upgrades fund, project pipeline, compliance, reporting and savings, organizational capacity, and marketing education and outreach.	35 Points
Small, Women-owned, and Minority Owned Business Status and Subcontracting If the Offeror is a DSBSD-certified small business, the Offeror shall receive 100% of the points assigned to this evaluation criterion. Other businesses that are not DSBSD-certified small businesses will receive credit based on their Small Business Subcontracting Plan not to exceed 75% of the points assigned to this evaluation criterion (i.e., 20 points X 75%= 15 points). To assign points for this criterion, the Offeror's proposed subcontractor use of DSBSD-certified small businesses (in \$) is divided by the Offeror's total proposed price. The quotient is then multiplied by the points assigned for the criteria to determine the evaluation points to be assigned.	20 Points
Pricing Schedule The lowest price shall be scored the maximum number of evaluation points for price. The lowest price is then divided by each of the higher Offeror's proposed price in turn. The quotient is then multiplied by the points assigned for price to determine the evaluation points to be assigned to each higher price proposal.	10 Points

Sub-Program 2: Multi-Family Solar Plus Storage

Evaluation Category	Points Allocated
History, Qualifications and Experience Proposals will be evaluated on the Offeror's and associated staff's demonstrated capabilities, references and experience with working with clean energy lending, state and federal programs, distributed generation and storage projects, affordable housing and low-income serving programs, grant management, marketing, education and outreach campaigns and contractor management as well as Offeror's financial health.	35 Points
Program Management Proposal Proposals will be evaluated on the clarity and effectiveness of project narratives and approach to management of program design workshops, marketing, education and	35 Points

outreach, prioritization and deployment of pre-development, enabling upgrade and battery storage grants, revolving loan fund, state and federal regulation on a per project basis, project application, and pipeline and ensuring compliance with savings guidance and reporting requirements.	
Small, Women-owned, and Minority Owned Business Status and Subcontracting If the Offeror is a DSBSD-certified small business, the Offeror shall receive 100% of the points assigned to this evaluation criterion. Other businesses that are not DSBSD-certified small businesses will receive credit based on their Small Business Subcontracting Plan not to exceed 75% of the points assigned to this evaluation criterion (i.e., 20 points X 75% = 15 points). To assign points for this criterion, the Offeror's proposed subcontractor use of DSBSD-certified small businesses (in \$) is divided by the Offeror's total proposed price. The quotient is then multiplied by the points assigned for the criteria to determine the evaluation points to be assigned.	20 Points
Pricing Schedule The lowest price shall be scored the maximum number of evaluation points for price. The lowest price is then divided by each of the higher Offeror's proposed price in turn. The quotient is then multiplied by the points assigned for price to determine the evaluation points to be assigned to each higher price proposal.	10 Points

Failure to submit all information requested may result in Virginia Energy deeming a proposal non-responsive. Proposals should be as thorough and detailed as possible so that the Offeror's capabilities to provide the required goods and services may be thoroughly evaluated.

5. Reporting and Delivery Instructions

Virginia Energy must comply with EPA and other federal regulations and procedures governing financial awards as outlined in the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, 2 CFR Part 200. Federal regulations require EPA to monitor each grant recipient and grantees for each project, program, sub-recipient, function, or initiative supported by federal funds to ensure compliance with all federal regulations. The goal of grant monitoring is to maximize the effectiveness of awards, to confirm compliance with applicable federal and state regulations and to ensure awards are on schedule and on budget. The Contractor shall be Virginia Energy's partner in ensuring all reporting and compliance requirements are met.

All data collection qualifying as environmental information must comply with Virginia Energy's Quality Assurance framework, including the SFA Quality Management Plan (QMP) and Virginia Energy's Quality Assurance Project Plan (QAPP). This QA framework ensures data integrity for data considered "environmental information"; such as solar capacity, energy savings calculations, battery storage, and region; in compliance with EPA environmental data policies. Virginia Energy's QAPP is pending EPA approval and will be shared once approved.

The Contractor shall submit reports conveying program status and any issues in support of Virginia Energy's compilation of reports including, but not be limited to:

Semi-Annual Reporting & Transaction and Project-Level Reporting

Virginia Energy is required to submit semi-annual reports and transaction and project-level reporting to the EPA. The program administrator(s) will need to compile data for these reports and ensure all contractors accessing Solar for All funds are able to report on the following list. This list is subject to change; a final list is forthcoming from EPA.

- Program income (Programmatic income 2 CFR 200 §200.307)
- Project location and LIDAC qualification
- Project type and details
- Solar system Useful Life and degradation rate
- Asset owner, building type
- Number of households served
- Estimated Annual Household Savings Provided by project
- Description of household savings (financial or in-kind)
- Jobs created
- If the project included work from a Registered Apprenticeship Program
- Average Estimated Annual Household Energy Savings
- System size
- System cost and upfront costs
- Utility provider name
- Utility baseline rate and escalation rate
- Solar generation compensation rate (net-metered)
- Customer baseline energy consumption
- Storage power capacity (in kw), cycle efficiency, response time, duration of discharge
- Emissions reductions
- Annual solar incentive(s) received by end beneficiary
- Household savings calculation methodology (to be developed by Virginia Energy)
- Program administrator to support on narrative reporting, which may include community outreach, success stories, and challenges in implementation.

Final Report

Virginia Energy must submit a final report to EPA no later than 120 calendar days after the end date of the Virginia Solar for All Period of Performance. Virginia Energy must submit a report containing detailed narratives describing program performance for the entire Period of Performance, representing an overall assessment of the implementation of Virginia Energy's EPA-approved Solar for All Workplan, supported with qualitative discussions and quantitative metrics. The Contractor must support the development of this final report, including the following broad elements:

- Progress towards objectives on key performance metrics over the entire Period of Performance.
- Summary of key activities completed in the entire Period of Performance, including case studies across different types of Financial Assistance and Project-Deployment Technical Assistance undertaken to enable Low-Income and Disadvantaged Communities to deploy or benefit from zero-emissions technologies.
- Geographic coverage of Financial Assistance and Project-Deployment Technical Assistance deployed in the entire Period of Performance.

- Descriptions and examples of actions the program took over the entire Period of Performance to meaningfully involve the communities the program serves in program design and operations.
- Plans for key activities (including anonymized current transaction pipeline) to be completed as well as outputs and outcomes to be achieved under the Closeout Agreement.

The documents for the final report must be submitted ready to be published on the EPA website for public consumption and must not include any material considered to be Confidential Business Information (CBI) or Personal Identifiable Information (PII).

In accordance with 2 CFR200.344 (f), 200.310 through 300.316, and 200.330, the Contractor must account for any real and personal property acquired with federal funds.

6. General and Special Terms and Conditions

Offerors shall review Attachment 1, Attachment 2, and Attachment 3, and identify any provisions that they object to or do not understand and provide specific comments in the proposal so that these concerns can be considered by Virginia Energy and discussed prior to award.

7. Method of Payment

All payment will occur on a reimbursement basis. Invoicing shall be performed on a monthly schedule. Invoices shall include the contract number and a summary of activities completed using Virginia Energy's invoice reporting template. Invoices must be sent to the individual addresses listed on each purchase order or agency purchase order. Invoices should be emailed to the Contract Administrator and Accounts Payable (accountspayable@energy.virginia.gov).

Invoice must include the following to be considered for payment:

- a. Name and address of contractor materials sold to
- b. Invoice Date
- c. Invoice Number
- d. Project Number/Contract Number
- e. Description of materials
- f. Unit of measure
- g. Unit price
- h. Extended price
- i. If applicable, any freight/shipping

Invoicing must include actual units used not approximate units provided on the bid schedule. Virginia Energy has the right to verify the accuracy of actual units used prior to payment.

DELIVERABLES FROM CONTRACTOR: Upon submitting invoice for payment contractor shall submit the following with the invoice:

- a. Receipt number
- b. Project number/contract number
- c. Description of materials
- d. Unit of measure

- e. Quantity and or weight of materials
- f. Date Received

All documents must include actual units purchased. In accordance with the Virginia Prompt Payment Act, payments will be made within 30 days after Virginia Energy's receipt of a valid invoice and verification of satisfactory completion of work.

TAXES: Sales to the Commonwealth of Virginia are normally exempt from State sales tax. State sales and use tax certificates of exemption, Form ST-12, will be issued upon request. Deliveries against this contract shall usually be free of Federal excise and transportation taxes. The Commonwealth's excise tax exemption registration number is 54-73-0076K.

If sales or deliveries against the contract are not exempt, the Contractor shall be responsible for the payment of such taxes unless the tax law specifically imposes the tax upon the buying entity and prohibits the Contractor from offering a tax-included price.