



REQUEST FOR PROPOSALS

TECHNICAL SERVICE PROVIDERS

Oweesta Corporation

June 7, 2024

I. INTRODUCTION

The Oweesta Corporation is organized and operated exclusively for charitable, educational, and similar purposes, including:

- (a) To make loans and grants to organizations or persons that benefit the economic vitality and sustainability of Native American and Indigenous communities, as permitted by Section 501(c)(3) of the Internal Revenue Code;
- (b) To provide educational and development services to borrowers, grantees and the communities they serve in order to enhance business planning, marketing, asset management, and financial management skills;
- (c) To educate investors and the general public about the needs of such economically distressed communities, and how investment capital can be utilized to revitalize such communities, remedy economic injustice, and combat discrimination;
- (d) To do anything necessary and proper in the advancement of the educational or charitable purposes herein set forth or such purposes as shall be recognized as proper and lawful purposes of a tax-exempt charitable organization; and
- (e) To provide capital, leverage private capital, and provide other forms of financial assistance for the deployment of low- and zero-emission products, technologies and services.

In furtherance of its purposes, the Oweesta Corporation seeks qualified vendors to support its efforts in financing energy projects, including solar energy initiatives, but not limited to: residential and community solar activities, resource development, workforce development, deployment of renewable energy sources, and improved resilience of critical infrastructure for tribal communities nationwide.

II. BACKGROUND

In August 2022, Congress passed the Inflation Reduction Act (IRA). An important provision of the IRA authorizes the U.S. Environmental Protection Agency (EPA) to implement the Greenhouse Gas Reduction Fund (GGRF), a historic \$27 billion investment that will be used to mobilize financing and private capital to facilitate development of energy efficiency and clean energy projects. EPA will implement the GGRF via three grant competitions to be awarded in 2024: the \$14 billion National

Clean Investment Fund (NCIF), the \$6 billion Clean Communities Investment Accelerator, and the \$7 billion Solar for All competition.

The Oweesta Corporation has been awarded \$156,120,000 through the EPA's Solar for All program to serve Native Nations in their residential and community solar energy development and implementation needs.

The Oweesta Corporation is actively working to refine and expand its finance and programmatic initiatives to deploy this injection of new federal capital into energy efficiency and clean energy solar projects in 2024 and the following years. To support this expansion, the Oweesta Corporation is looking to expand its capacity to deploy financing and associated products and services for solar energy projects in tribal communities focusing on residential and commercial solar initiatives.

The Oweesta Corporation intends to implement lending products, grant opportunities, subsidy and stipend products and services through this EPA Solar for All grant funding. Projects can include, but are not limited to: workforce development, residential solar projects, community solar projects, energy efficiency, energy conservation and energy demand management.

III. PURPOSE

The Oweesta Corporation issues this Request for Proposals (RFP) in order to seek assistance in developing these new energy programs and to deploy funds from the GGRF to significantly expand access to loans and other mechanisms needed to finance demand for energy infrastructure projects that reduce or lead to the reduction of greenhouse gases for Native Nations nationwide. For purposes of this RFP, "energy infrastructure" is broadly defined to include, but is not limited to the following:

1. **Distributed Energy Generation and Storage** - Projects, activities, and technologies that deploy small-scale power generation and/or storage technologies (typically from 1kW to 10,000kW), plus enabling infrastructure necessary for deployment of such generation and/or storage technologies.
2. **Net-Zero Emissions Buildings** - Projects, activities, and technologies that either (1) retrofit an existing building, making a substantial contribution to that building being a net-zero emissions building and as part of a plan for that building achieving zero-over-time, or (2) construct a new net-zero emissions building in a low-income and disadvantaged community. Net-zero emissions buildings include residential (e.g., 1- to 4-family homes, manufactured homes, multifamily housing), commercial, industrial, and other buildings.

The selected vendor will serve as a "delivery team" for the Oweesta Corporation and will provide diverse technical, energy, environmental, and financial services on an ongoing basis. The Oweesta Corporation seeks qualified vendors to support its efforts to stimulate the growth and development of clean energy and energy infrastructure investment with Tribes, Tribal Utility Authorities, Tribally Designated Housing entities (TDHEs), which may be Tribal Housing Authorities (THAs), Native Community Development Financial Institutions (CDFIs) or non-profits. The selected vendor may be invited to support any new or existing program to provide technical services as needed.

The Oweesta Corporation's aim is to provide Native Nations and their respective tribal members energy resiliency through the provision of residential and community solar energy initiatives and installations as some of the main objectives with the funding. The Oweesta Corporation is particularly interested in working with vendors that can provide services for projects in underserved sectors, i.e., rural and tribal communities across the lower U.S, Alaska, and Hawaii.

Given the priority for rapid deployment of GGRF funds and longer recycling timelines, the Oweesta Corporation intends to position loans to be attractive to the private market. The Oweesta Corporation will design these finance initiatives to ensure that 40% of investment benefits flow to "low-income and disadvantaged communities" (LIDACs), per federal requirements. One hundred percent (100%) of the Solar for All funds received through the GGRF are expected to benefit LIDACs with a minimum of 20% household savings for residential projects.

IV. SCOPE OF WORK

The Oweesta Corporation employs staff and enters contracts with consultants to carry out its day-to-day activities. The Oweesta Corporation staff is responsible for making decisions on program design, eligibility, incentive levels, marketing plans, and project contracts while seeking guidance and input from the supporting consultants. Nevertheless, the delivery team we are seeking through this RFP will be expected to help administer certain day-to-day tasks as needed, including providing customers and trade vendor support, conducting any non-automated underwriting tasks, and following up on customer management, reporting, and technical support. The Oweesta Corporation staff will manage the GGRF program budget.

Following is a task-by-task description of the work covered by this RFP. As explained below, bid proposals must reflect the bidder's plan, approach, capacity for each task, and describe related experience.

a. Program Design

The Oweesta Corporation is seeking technical assistance to design and deploy solar energy financial assistance programs for energy infrastructure projects designed to reduce greenhouse gases for Native Nations across the United States. Financial assistance will include low-interest loans for the wide variety of clients to include residential, multi-family housing, tribal governments, businesses, municipal utilities, and investor-owned utilities just to name a few. The Oweesta Corporation seeks assistance with the development of all the elements required to implement a loan program, including but not limited to: underwriting, due diligence procedures, project design verification and construction oversight.

b. Project Kickoff Meeting

The chosen vendor, in consultation with the Oweesta Corporation, will organize and facilitate a project kickoff meeting. The purpose of the meeting is for the Oweesta Corporation and the vendor to establish a common understanding of the deliverables, the overall platform development schedule,

and to provide the foundation for development of the work plan. At a minimum, this meeting should include discussion of the proposed statement of work and schedule, initial data requests, and communication protocols and expectations.

c. Stakeholder Engagement

Portions of the GGRF include a planning period not to exceed one year. A planning period will provide time to refine program plans after receiving an award from EPA and before beginning to deploy financial and technical assistance. Oweesta's Solar for All application proposes utilizing the planning period to develop program guidelines and shape technical assistance and workforce development offerings. During this time, the selected vendor will work with local governments, tribal governments, community-based organizations, faith-based organizations, non-profits, workforce development organizations, solar and housing developers, residents, and other key stakeholders to address the energy needs of the broader Native populations while building trust through community engagement to sustain the GGRF over the long term.

d. Centralized Website Platform

The Oweesta Corporation is requesting the vendor develop a centralized website platform (platform) for Indian Country's energy infrastructure needs. The goal is to help connect Native Tribes, Native CDFIS, Native non-profits and other interested parties with financial resources, and technical assistance all in a single, common, online platform. Currently, Oweesta lacks a one-stop shop for residents, businesses, and local governments to understand what energy infrastructure assistance options are available to them.

- i. **Dedicated Resources by Stakeholder Group** - Create sub-pages for renters, homeowners, building owners, businesses, local governments, utilities and energy infrastructure related trade allies, with tailored information for each group.
- ii. **Resources Available** - Create a list of opportunities available, including but not limited to loan programs, grant programs, tax credits, rebate programs, energy audit and home weatherization programs.
- iii. **Income-Eligibility Lookup** - Residents can input their address and household size to determine if their household income is eligible for a variety of energy financial assistance programs.
- iv. **Education, Training, and Apprenticeship Opportunities** - Provide a centralized resource on energy infrastructure education, training, pre-apprenticeship, apprenticeship, and other relevant programs.
- v. **Consumer Protections** - Detail the program's consumer protections to promote awareness among residents and businesses. There will be a form for residents to submit complaints to escalate issues to the proper division. Provide assurances that sensitive customer information will only be used for the purpose intended.

vi. **Feedback Forum** - Encourage current and potential participants of the energy infrastructure programs to share their experiences, feedback, and suggestions for continuous improvement.

vii. **Decisioning Capabilities**

- **Instant Approval Capabilities** – This functionality may require additional integrations and criteria such as:
 - Income verification
 - Credit pull (when applicable)
 - Proof of property ownership
 - Verification of LIDAC status
- **Manual Review Capabilities** – For projects that have more complex underwriting requirements, Oweesta Corporation staff and vendor staff must have the ability to manually review a project.
- **Variable Underwriting Criteria** – The platform must be designed so that underwriting criteria may be changed or modified for different products overtime.
- **Customer Consent** – As may be required by any consumer protection laws or related regulations, the customer must be able/required to provide consent before submitting their information.
- **Offer Presentation** – Based on intake information provided by the customer.
- **Offer Selection** – The customer must be able to select an offer and complete the necessary documentation to accept it.

viii. **User Management and Portals**

- **User Flexibility** – The platform must allow use by individuals and various entities.
- **User Access** – The platform must allow Oweesta Corporation to control who has access to the platform and their level of access.
- **Trade Vendor Portal** - Trade allies should have a separate set of functionalities in which they can view all the customers associated with their projects and the status of those projects. Note that trade vendor access is limited to the period of loan application and project construction; once the loan is paid out, they do not have access to customer payment information.
- **Customer Portal** – Customers must be able to view transaction history, view statements, inquire about specific issues, make unscheduled payments (where allowed), update payment information, update contact information, and other related functions.
- **Reporting and Data Management** - Like the reporting plan to the EPA, the website will provide residents with outcomes and metrics of Oweesta’s solar energy infrastructure programs on an ongoing basis.

e. **Reporting and Other Deliverables**

The chosen vendor will work with the Oweesta Corporation staff to support a number of reporting requirements. For example, they will conduct monthly reconciliations between loan activity and program budgets and perform periodic reporting of financing activity by loan type and fund type.

They will facilitate data sharing with the Oweesta Corporation, and cross-referencing project information as appropriate. They will conduct any analysis necessary for planning purposes, projecting future activity by loan and fund type, and anticipating any necessary program adjustments. They will assist the Oweesta Corporation staff in generating any quarterly and annual performance and financial reports as required by U.S. EPA, the Oweesta Corporation's Board and auditors or any others as determined by the Oweesta Corporation.

V. FEES, CHARGES AND EXPENSES

Fees and expenses of the vendor are to be paid by the vendor. Oweesta nor any other entity shall be liable for expenses incurred by the vendor.

VI. AGREEMENT

The vendor selected will be required to enter into a written Agreement for Services with the Oweesta Corporation for a 5-year period. The Agreement will include, among other provisions, immediate termination for cause; termination by either party without cause with thirty days prior written notice; provisions for changing assigned personnel; requirements concerning general liability and bodily injury as well as professional liability/errors and omissions coverage acceptable to the Oweesta Corporation.

The Oweesta Corporation anticipates that the selected vendor will provide services as requested and outlined in this RFP. Additionally, the Oweesta Corporation will own all of the work products and inputs used in the development of the website, including computer code, domain names, software and pass codes. The Oweesta Corporation will not, however, guarantee that any minimum compensation will be paid to the firm or any minimum usage of the firm's services.

VII. PROPOSALS

Each response to this RFP shall include the information described in this section. Failure to include all of the information specified may be cause for rejection. Additional information may be provided as long as 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.

1. **Qualifications and Experience:** 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 (3) years. Please provide links to reports or studies conducted by your firm.
2. **References:** Provide a minimum of three (3) references for projects or services similar in nature and scope that have been completed within the last five (5) years. Include brief descriptions of the projects, dates and reference contact information. Public sector references are preferred.
3. **Qualifications of Team:** 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 as well as their assigned geographical location. 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. List each individual's experience in the design and deployment of financial assistance programs for energy infrastructure projects designed to reduce greenhouse gasses. Include (as an attachment to the proposal) each individual's resume. **Include resumes of only those personnel who will be assigned to these activities.**

4. Project Understanding: Based on the available information and experience with similar projects, provide a narrative describing your understanding of the services requested in this RFP. Include any issues that you believe will require special consideration for this project as well as identify any unique approaches or strengths your company may have.
5. 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.
6. Competency: The Oweesta Corporation wants to ensure that the successful proposer has the necessary resources and experience to provide the specified services in a satisfactory and timely manner. Please list and explain any pending bankruptcies, liens, judgments, lawsuits, arbitrations or any similar actions filed or resolved within the last seven (7) years. Please indicate whether a client has ever terminated a contract with your firm for breach, and if so, please explain.
7. Minority/Female Employment Opportunities. Please discuss your firm's commitment to minority and female employment opportunities and the success of those efforts. Provide a copy of your firm's EEO policy as an attachment.
8. Conflicts of Interest. Please describe any potential or actual conflicts of interest in connection with your firm's involvement with Oweesta, Tribal Nations, States nationwide, or EPA.
9. Cost. The cost proposal should include the hours and hourly rates at a firm fixed price for each of the key personnel and subcontractors as well as a schedule of other basic costs, should additional services be necessary.

VIII. SUBMITTAL REQUIREMENTS

To be considered, an electronic copy of your proposal must be received by 5:00 p.m. Mountain Time on July 10, 2024. E-mail proposals to Mary@Oweesta.org. If you do not receive a confirmation of receipt by noon of the business day following your submittal, contact the Oweesta Corporation at (303) 774-8838. Any proposals received after this deadline will be rejected.

If you have any questions regarding this solicitation, please email them to Mary@Oweesta.org.

It is the responsibility of each potential proposer to check the Oweesta Corporation website for responses to questions and RFP revisions. We will not be sending questions and responses or RFP revisions to individual firms.

The proposals will remain confidential until the Oweesta Corporation has selected the vendor. All proposals become the property of the Oweesta Corporation and shall not be returned to the firm unless all proposals are rejected, or the RFP is cancelled. Otherwise, the contents of all proposals will be in the public domain and be open to inspection by interested parties subject to exceptions provided in Colorado law. The Oweesta may treat all information submitted by a firm as public information following the conclusion of the selection process unless the firm properly requests that information be treated as confidential at the time of submitting the proposal. Any request for confidential treatment of information must be included in the transmittal letter with the firm's proposal. In addition, the firm must identify the specific legal grounds for such request. If the firm designates any information in its proposal as confidential the firm must also submit by email one (1) copy of the proposal form which confidential information has been excised. The confidential material must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the proposal as possible.

IX. SELECTION OF PROPOSAL

All proposals received will be evaluated for the purpose of selecting a vendor which best meets the requirements of the RFP. The following areas will be considered:

1. **Qualifications and Experience of the Firm and the Team Assigned to the Project:** Proposals should demonstrate significant experience in the design and deployment of financial assistance programs ideally with an emphasis on solar energy infrastructure projects designed to reduce greenhouse gasses. Personnel dedicated to the project should have an adequate amount of expertise related to financial assistance programs, clean energy, and energy infrastructure in general. Proposer's past work in this field or on similar projects will be considered in the selection process.
2. **Project Understanding and Project Plan:** Highly ranked proposals will demonstrate an understanding of the goals and work required by the scope of services and will provide a framework to develop the plans described in this RFP.
3. **Minority/Female Employment Opportunities:** The success of your company's efforts toward the employment of minorities and women will be evaluated.
4. **Cost:** The cost proposal should include the estimated hours and hourly rates at a firm fixed price for each of the key personnel and subcontractors as well as a schedule of other basic costs, should additional services be necessary. While cost is an important factor, it is only one of the items considered.

X. OTHER MATTERS:

Responses to the RFP should not be construed as binding the Oweesta Corporation to offer any particular financing programs or products.

1. The Oweesta Corporation reserves the right to:

- a. Cancel this solicitation;
 - b. Reject any or all proposals;
 - c. If the Oweesta Corporation deems it necessary or appropriate, in its sole discretion, to revise any part of this RFP, addenda will be provided to all parties originally receiving this RFP;
 - d. Select any proposal and negotiate with the firm which, in the Oweesta Corporation sole opinion, meets the Oweesta Corporation's needs regardless of the estimated costs in the proposal;
 - b. Determine whether conflicts or potential conflicts will preclude a proposer from being considered;
 - c. Request additional information and/or an oral interview with individuals or firms prior to the award;
 - d. Negotiate a contract; and
 - e. Waive any technicalities and make any award that it determines to be in the Oweesta Corporation's best interest.
2. The OWEESTA CORPORATION is not obligated to provide a debriefing for any proposers.
 3. The OWEESTA CORPORATION is not liable for any costs incurred by any parties submitting proposals.
 4. It is anticipated that selection of the vendor will occur July 2024.
 5. OWEESTA CORPORATION requires all vendors to participate in E-Verify. If awarded the contract, please be prepared to provide proof of participation.

The Oweesta Corporation is committed to principles of equal employment opportunity within the Oweesta Corporation and equal access to all of its programs, services, and activities. Accordingly, the public, Oweesta Corporation employees, applicants for employment, contractors, regulated entities, and all other persons are to be treated equitably and fairly, and not be subjected to harassment, retaliation, or intimidation, regardless of age, ancestry, color, disability, genetic information, military/veteran status, national origin, pregnancy, race, religion, or sex (including sexual orientation and gender identity), or socioeconomic status.

DO NOT CONTACT THE OWEESTA CORPORATION BOARD MEMBERS or OWEESTA CORPORATION STAFF REGARDING THIS RFP. Questions regarding this solicitation should be submitted in the manner described in the Submittal Requirements section above.