



**REQUEST FOR PROPOSAL
FOR WEBSITE & BRAND DEVELOPMENT**

September 18, 2024



I. GENERAL INFORMATION.

- a. Purpose.** This request for proposal (RFP) is to contract for an organization to support our team with website and brand development. These services will be provided to the Solar and Energy Loan Fund (SELF), a 501(c)(3) awardee of the Solar for All (SFA) grant competition of the Greenhouse Gas Reduction Fund (GGRF). In April 2024, the U.S. Environmental Protection Agency (EPA) announced its selection of SELF and its two coalition partners, Solar United Neighbors (SUN) and The Nature Conservancy in Florida (TNC), as selected applicants for a \$156,000,000 grant award.

SFA is a provision of the Inflation Reduction Act focused on creating new and expanding existing low-income solar programs, which will enable households in low-income and disadvantaged communities to benefit from distributed solar energy. SFA will advance the three overarching GGRF program objectives: 1) reduce GHG emissions and other forms of air pollutants, 2) deliver benefits of greenhouse gas- and air pollution reducing projects to American communities, particularly low-income and disadvantaged communities, and 3) mobilize financing and private capital to stimulate additional deployment of greenhouse gas- and air pollution-reducing projects.

To learn more about the Florida Solar for All (FSFA) coalition and approach, please visit <https://solarenergyloanfund.org/florida-solar-for-all/>.

SELF anticipates that fees for this engagement will be paid by our award and will be in compliance with any terms of such award. We are procuring services in adherence with the requirements set forth in 2 CFR § 200.317 et seq. and EPA's Best Practice Guide for Procuring Services, Supplies, and Equipment.

SELF reserves the right to (a) reject any or all proposals without explanation, (b) waive technicalities or irregularities, (c) request additional information from any Proposer (including a list of client references), (d) withdraw this RFP at any time, (e) make such selection deemed in its best interest (in SELF's sole and exclusive discretion), and/or (f) make multiple or partial awards. The award of the contract(s) will not necessarily be made to the organization offering the lowest price. The issuance of this RFP does not imply that SELF is making an offer to conduct, expand, or terminate business with any Proposer. Your preparation and submission of a response does not commit SELF to award the business to any Proposer even if all the requirements are met.

- b. Instructions on Proposal Submission.** Proposals must be submitted electronically no later than **5 P.M. ET on October 3rd, 2024**. All costs incurred in



the preparation of a proposal responding to this RFP and/or participating in any interview process will be the responsibility of the Proposer and will not be reimbursed.

- c. **Confidentiality.** The Proposer agrees to keep confidential all nonpublic information about SELF and its coalition partners and agrees that persons or entities with which the Proposer participates in responding to this RFP will be bound by the same confidentiality obligations. All proposals and other documentation submitted in response to this RFP will not be returned by SELF and will become property of SELF subject to disclosure under the Freedom of Information Act.

II. SCOPE OF SERVICES. The selected Proposer(s) will provide SELF with the following services:

A qualified website designer capable of providing expert designer services and support to produce a new mobile-device friendly website and brand that expands upon SELF's existing landing page: <https://solarenergyloanfund.org/florida-solar-for-all/>.

Overview of Project. Create a responsive, mobile-friendly website design and branding package for the public-facing and official homepage for the Florida Solar for All (FSFA) program. The FSFA program will fund rooftop solar for low-income households in disadvantaged communities across Florida. The program will administer a \$156M grant award from the U.S. Environmental Protection Agency's (EPA) Greenhouse Gas Reduction Fund in the form of grants, loans, and technical assistance to energy-burdened households. The program's public launch date is February 15, 2025.

Scope of Work

1. Website Design and SEO – Deliverables are split into two phases to allow the public to receive information prior to full development and to solicit job applications and response to requests for proposal prior to full program launch.
 - a. Phase 1 – “Pre-Launch” – Primary function to serve as a landing page for static content that has one-way sharing of program updates, stakeholder meetings, solar resources, and general program information. Provide public access to a newsletter sign-up that directs to an identified email, and provide portals for both Requests for Proposals and job postings for new program staff.
 - b. Phase 2 – “Program Launch” – A robust, fully dynamic and Salesforce CRM integrated platform to intake customer data and transmit to multiple databases for implementation of projects. The site will have integration with other SFA relevant online resources to include SELF-owned customer portal site <https://canopyclimate.com/> and access to additional online resources identified by SELF, as well as their SFA implementation



partners, Solar United Neighbors (“SUN”) and The Nature Conservancy (“TNC”). The website should include an internet bot and/or AI help desk to direct visitors to information on the site or partner sites. See Functionality below for further expectations.

2. Maintenance – Site updates and general maintenance and SEO optimization functions expected.
3. Branding Package, inclusive of logo, taglines, color scheme, graphics, fonts, slide templates, etc.

Timeline. The timeline is accelerated, and the selected consultant must begin work in early October 2024.

- October 21, 2024 - Branding and Phase 1 website deliverable.
- December 15 2024 - Phase 2 website Beta deliverable.
- January 15, 2025 – Fully deployed site.
- January 2025 - December 2025 - Responsive troubleshooting and rapid support.
- 2026-2028 - Potential to renew contract for on-going maintenance. This is not included in this scope of work.

Audience. The audience is the entire State of Florida. Primary users are a) low to moderate-income households, b) solar installer contractors and c) multifamily property owners. The site will be heavily trafficked by multiple stakeholders, including state and local government agencies, state and community-based nonprofits, media outlets, and industry partners, as well as academia and the general public. The site must be mobile device responsive, and designed for lower-income and historically disadvantaged citizens and communities to easily navigate a complex process of applying for subsidized rooftop solar. The program will provide staff to assist users who may be unfamiliar with web forms.

Functionality. The primary purpose of the final site is to serve as a “portal” that transmits/can support inquiries from the public and direct them to forms in two (2) unique and linked Salesforce databases, managed by SUN and SELF. It must have the ability to use AI functions and integrate to other platforms, including but not limited to Google Maps API. The secondary purpose is to serve as a public information clearinghouse with educational resources. Frequent additions and updates are expected. The third purpose is to display program performance metrics, ideally with automations from previously mentioned and/or additional databases.

The expectation for Phase 1 is to publish a minimally viable site of static pages for the public to view program updates, and to include capability for a newsletter sign-up, a portal to publish requests for proposals (RFPs) with the ability for proposers to upload their proposals, and a place to publish job advertisements.



- The branding package is expected to be developed concurrently with Phase 1 site development.
- The expectation for Phase 2 is to publish a robust, fully dynamic platform that integrates Salesforce platforms and enables the intake of secure customer data and transmit it to multiple databases for implementation of projects.

Long-term Relationship. Updates and maintenance to the webpage will be required throughout the lifetime of the program. The EPA’s program is intended to last five years through 2028. During year one of program implementation, it is expected that the site will require regular functional improvements. In addition, between February 2025 and December 2025, the program may be refined, and the site will require troubleshooting and rapid support in response to any changes. The program will be serving thousands of Florida households and both functionality and “up-time” must be consistent. Throughout 2026 and 2028, the program is expected to operate in a routine fashion with minimal changes. Please include on-going maintenance services after year one as a separately budgeted line item in the proposal.

Branding. Multiple domain names are purchased and owned by the coalition. A full brand kit can be produced in-house, with a subconsultant, or indicate if not available. Photos, images, and graphics for the website are expected to be included in the brand kit. The general look and feel must represent the logos, colors, and images and missions of coalition partners and must encapsulate a) climate action, b) rooftop solar, c) thriving inclusive communities and c) accessible financing options in all regions within Florida.

III. **PROPOSAL CONTENTS.** The Proposer in its proposal shall include the following (including the appropriate section number):

- a. **Section 1 (Experience).** The Proposer should describe its qualification and experience related to the areas outlined in the scope of services above.

Please describe the types of services Proposer has previously provided to clients, including specific companies that Proposer has worked with, the size of those companies, and whether Proposer has worked for those companies on a recurring basis.

- b. **Section 2 (Organization, Size, Structure).** The Proposer should describe its organization in terms of the following:

- Company or organizational overview
- Size and experience of company
- Relevant office locations (including size of each relevant office) and geographic presence



- A list of the firm's clients (indicating which clients the firm has worked with on a recurring basis)
- Diversity metrics of staff and any board of directors
 - Male/Female
 - Race and Ethnicity
 - LGBTQ+
- Indicate if your organization qualifies as a Disadvantaged Business Enterprise (DBE) (as defined in 40 CFR § 33.103)

Please include a copy of the Equal Opportunity/Affirmative Action Policy and DEI statement, if available. SELF encourages the participation of businesses owned by Minorities, Females and Persons with Disabilities in the implementation and execution of all projects, either on a direct basis or through sub-contracting efforts.

Please confirm whether you are aware of any actual or apparent conflict of interest arising from this proposed engagement (including any conflicts described in 2 CFR § 200.318(c)).

- c. **Section 3 (Qualifications).** The Proposer should identify assigned staff and provide a description of their qualifications. Proposers should also describe and demonstrate proficiency in the creation and management of the following:
- i. Responsive website design that easily adapts to various screen sizes and devices to provide optimal viewing experience for all users;
 - ii. Well-structured navigation menus that enhance the user experience by enabling visitors to find information quickly and easily, including logical categorization and intuitive labeling of menu items;
 - iii. Compelling visual design that captures users' attention with appealing design elements, including high-quality images, graphics and typography;
 - iv. Minimal page load time that optimizes images, minimizes HTTP requests and leverages caching techniques to improve loading speeds;
 - v. Utilization of SEO best practices to enhance visibility in search engine results, to include optimization of meta tags, usage of descriptive URLs and incorporation of relevant keywords in content;
 - vi. Usage of robust security measures, including SSL encryption and regular software updates to protect user data and build trust;
 - vii. Integration of web analytics tools like Google Analytics to track website performance, user behavior and traffic sources;
 - viii. Integration with existing Salesforce APIs and accessibility to users with disabilities by adhering to WCAG standards and non-English speaking users;



- ix. Identification of ongoing website support staff with prompt availability for resolution in the event of website errors, security alerts and customer access failures.

d. Section 4 (Pricing).

The Proposer should offer these services on a fixed-fee basis. The fee structure should be transparent, competitive, and reflective of the quality of service provided. The Proposer should include a detailed breakdown of the associated fees. Please differentiate milestone payments for the two phases, and separate pricing for the optional branding package.

- e. Section 5 (Cybersecurity and Breaches).** The Proposer should disclose and describe its cybersecurity policies and procedures to protect client data. If the Proposer has suffered any known cyberattacks or breaches, please describe the event and the organization's response and remedial actions taken. Please include a copy of your Data Privacy and Cybersecurity Policy.

- f. Section 6 (Insurance).** Describe the levels of coverage for liability insurance and cyber insurance your organization carries.

- g. Section 7 (Debarment or Suspension).** Confirm that neither your organization nor any individual employee has been debarred or suspended from or ineligible for participation in Federal assistance programs.

- h. Section 8 (Contact Information).** The Proposer should include the name, title, mailing address, email address, and telephone number for the primary point of contact of the Proposer.

IV. PROPOSAL EVALUATION.

- a. Submission of Proposals.** All proposals must be submitted electronically in PDF format to Beth Galante (beth@secureenergysolutions.net) and David Graber (davidg@solarenergyloanfund.org). SELF is not responsible for electronic files that cannot be opened or corrupted files. If files cannot be opened, SELF reserves the right (but does not have the obligation) to contact the Proposer and take reasonable measures to receive an openable file. Submissions must not be password protected or have any type of restriction applied to the file or contents. By submitting information, the Proposer represents that they have read and clearly understand this RFP and are capable of providing the required services. SELF may request additional supplemental information from Proposers in order to appropriately evaluate proposals.



b. Evaluation Procedure and Criteria. SELF will review proposals (including information obtained during any interviews) against initial criteria, including:

- i. First-tier evaluation metrics: responsiveness to RFP, prior relevant experience, proposed approach to scope of work, price reasonableness (including compliance with 2 CFR § 200.459), and team capacity.
- ii. Second-tier evaluation metrics: timing for delivery of scope of services, DBE status, and interviews (if conducted) with potential reference checks following interviews.

In all instances proposals must comply with all EPA procurement rules and guidelines. All responses must be presented economically and efficiently. Superfluous information and documentation may be cause for a reduction in scoring. SELF may request a meeting with the proposed team as part of the selection process. SELF’s decision regarding this RFP will be final and not subject to review. Scoring will be based upon the proposal materials received, but may be adjusted based upon interviews (if offered).

c. Terms of Engagement. SELF intends for this RFP to result in the selected Proposer(s) executing a Services Agreement, which will enable SELF to include the initial scope of work with the potential to add additional scopes of work if the project requires extension or expansion. Any such agreements with Proposer(s) will (a) be contract agreements, not subrecipient agreements and (b) comply with the requirements set forth in Appendix II to 2 CFR Part 200 – Contract Provisions for Non-Federal Entity Contracts under Federal Awards (2 CFR § 200.327) and in Appendix A to 40 CFR Part 33 (40 CFR § 33.106), as applicable. Proposers must be amenable to inclusion, in a contract, of any information provided whether herein or in response to this RFP or developed subsequently during the selection process. The selected Proposer(s) agree(s) to be bound by all applicable Federal, state, and local laws, regulations, and directives in the performance of such contract. The contract will be on a lump sum, fixed price, or cost reimbursement (“not to exceed”) basis, with payment terms to be negotiated with the selected Proposer(s).

d. RFP Timeline

RFP Process and Schedule	
Milestone	Date
Release of RFP	September 18th, 2024
Proposer Questions Due to SELF	5 P.M. ET on September 25th, 2024
SELF answers all Proposer Questions	September 27th 2024



RFP Proposals Due to SELF	5 P.M. ET on October 3rd, 2024
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* Timeline is an estimate and subject to change by SELF without notice.

V. QUESTIONS AND CONTACT INFORMATION.

If you have any questions concerning this RFP, contact Beth Galante (beth@secureenergysolutions.net) and David Graber (davidg@solarenergyloanfund.org). Proposers are prohibited from contacting any other SELF employee about this RFP. Only written questions submitted to SELF will be entertained and will receive response(s) in writing. Failure to adhere to this requirement will be grounds for disqualifying your proposal. If appropriate, the question (without identification of the questioner) and its answer will be posted to our website for clear and consistent communication. Each Proposer is responsible for requesting further explanation, by the date noted above, if they do not fully understand or believe the information contained herein could be interpreted in more than one way. SELF shall have no obligation to correct, nor bear any responsibility for errors (whether by commission or omission), ambiguity, or inconsistency in this RFP.