



**REQUEST FOR PROPOSAL  
FOR SOLAR PLATFORM**

**October 29, 2024**



## I. GENERAL INFORMATION.

- a. **Organization.** The Solar and Energy Loan Fund (SELF) is a non-profit 501(c)(3), certified Community Development Financial Institution (CDFI) that focuses on helping low- and moderate-income homeowners and communities access education and affordable financing to revitalize neighborhoods ‘one residence and commercial property at a time’. SELF’s goal is to enhance to the quality of life and contribute to a healthy, safe, clean environment through financing home and business property improvements that a) reduce energy consumption and costs through energy efficiency and renewable energy upgrades; b) increase safety and equity through wind hazard mitigation (e.g. hurricane shutters, impact windows and metal roofs) and; c) promote healthy and quality of life and d) help water quality and conservation and e) helping with aging in place home adaptations, with positive impacts for community members and the environment.

SELF helps low- and moderate-income and working-class families, access low cost financing options for sustainable home improvement projects, with an emphasis on reducing energy consumption and shifting energy sources from carbon-based fuels to clean energy alternatives. Homeowners are also adapting to climate change by replacing old roofs and installing impact windows, doors and hurricane shutters. Beneficiaries are increasing energy efficiencies, incorporating clean energy alternatives, increasing wind resilience, and enhancing comfort, health, livability, and quality of life.

- b. **Purpose.** This request for proposal (RFP) is to contract for an organization to support our team with a scalable technology platform to process 500+ monthly solar applications, including loans, grants and subsidies. 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.

- c. Instructions on Proposal Submission.** Proposals must be submitted electronically no later than **5 P.M. ET on November 11, 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.
- d. 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. SOW Summary.** SELF is seeking a scalable technology platform to process 500+ monthly solar applications, including loans, grants, and subsidies. The platform will manage SELF's two distinct residential solar programs (Florida Solar For All and Flagship) and enhance the existing salesforce-based loan management process. It should include a centralized portal for customers, contractors, and admins to fill out forms, track project milestones, complete tasks, and manage documents.



**b. Program Type.**

1. **Florida Solar For All (FSFA).** The FSFA program will provide grants and subsidies for low-income households who want to install rooftop solar in Florida only. SELF, the lead program administrator, will be working alongside its coalition partners Solar United Neighbors (SUN) and The Nature Conservancy in Florida (TNC) to launch this program on February 15, 2025.
2. **Flagship.** The Flagship program provides financing options for homeowners seeking solar installations but are ineligible for FSFA due to income or project limitations. Unlike FSFA, this program can be offered in other states outside of Florida.

**c. Scope of Work Deliverables**

1. Deliverables are divided into two phases based on importance:
  - a. **Phase 1 – “Core Product”.** The objective for the first phase of the project will focus on supporting all the core functionalities mentioned in the SOW Functionality section. SELF’s existing salesforce framework will act as the primary driver for the loan & project management system. The different stages of the project lifecycle will be incorporated into both the customer and contractor portal.
  - b. **Phase 2 – “Finished Product”.** The objective of phase 2 is to upgrade and/or modify the core functionalities developed in phase 1 to better streamline all solar projects. This will include the functionality for admins to change project stages within the centralized portal and to establish a communication channel with the customers & contractors. Additionally, the platform should support SELF’s out-of-state solar applications as well.
2. General Maintenance – Maintenance requests should be completed within the industry's standard timeframe.
3. Future Additions - Expand the platform's capabilities to include a leasing product for FSFA as well as support additional project types for multi-family buildings and commercial solar.

**d. Timeline.** The timeline is accelerated, and the selected candidate must begin work in early November 2024. It is critical for phase 2 to be completed with ample enough time to make additional modifications if needed.

- January 17, 2024 - Phase 1 complete.
- January 31, 2025 - Phase 2 complete.



- February 15, 2025 – Solar For All Program Launch Date

e. **Audience.** The audience for this project includes:

- **Customers:** Individual applicants who are seeking grants, subsidies, or loans for solar installations. These applicants will initially be single-family households looking for low-cost financing options.
- **Contractors:** Solar installers who are assigned to customer projects for tracking and managing purposes.
- **Administrators:** Primary admins (SELF staff) who have full access, including confidential information, while secondary admins (coalition members) who have limited access, excluding confidential data.

f. **SOW Functionality.** The final product will serve as a customer and contractor interface portal to SELF's existing Salesforce. The new platform will be capable of changing project stages and transferring data between two linked Salesforce databases managed by SELF and SUN. Additionally, the platform must be able to use API functions and integrate with third-party platforms such as Alloy and Plaid. Here are the list of the core functions:

1. **Program Eligibility Quick Check Form** - a program eligibility form will be embedded on the Florida Solar For All website. It will collect basic information such as stated income, household size, county, and homeownership status to guide homeowners to the appropriate solar program and direct them to the sign-up process. This check will be able to determine if the customer's stated income is less than or equal to 80% of the AMI set by The Department of Housing and Urban Development (HUD).
2. **Sign-Up/Sign-In Process** - customers will be able to create a user account using email-based authentication (one-time passwords) to ensure a secure, seamless user experience.
3. **Customer Application Form** - customers will fill out a dynamic application based on program type, project specifics, and geographic location that can integrate with Plaid and Alloy to verify income and run a credit check. Customers will be able to save their progress in case they do not complete an application in one sitting.
4. **Dashboard For Installation Management** - contractors will be able to register and have access to manage and track the status of all their assigned projects. This dashboard will allow contractors to filter projects by various criteria such as project type, status, and stage.
5. **Customer Project Tracking** - customers will be able to track the status of their own solar project from the start of the application to project completion.



6. **Quote Submittals and Requests** - contractors will be able to submit quotes through the portal when a customer requests for one. Customers will be able to view a list of approved contractors and initiate a quote request within their portal.
7. **Proposal Verification Form** - contractors will use the proposal verification form to input detailed project information. Based on the project information submitted, the system will be able to notify that adjustments are needed if the project does not meet SELF's general cost and solar design guidelines.
8. **Document Upload And Management** - customers will be able to upload documents such as to verify their income. Contractors will be able to upload documents needed to provide proof that their construction milestones have been completed prior to payout as well as additional documents for change orders, signed contracts, quotes, utility bills, etc.
9. **Integration With Salesforce** - the contractor and customer portal will integrate with SELF's salesforce as well as our coalition partner SUN's salesforce to ensure all project data, customer interactions, and contractor submissions are tracked and managed efficiently.
10. **Loan Payment Calculator** - a loan payment calculator will be available within the portal to estimate customer's monthly payments based on total financing cost, product type (grant, subsidy, or loan), term, interest rate, and incentives.
11. **Tiered and Program Specific Admin Access** - confidential information will be shared only with primary admins. Non-confidential information will be shared with secondary admins. Admins may have access to one or both solar programs.
12. **Data Visualization & Reporting** - important metrics will need to be collected throughout the project lifecycle to track performance and for federal reporting and compliance.

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. Usage of robust security measures, including SSL encryption and regular software updates to protect user data and build trust;
- ii. Creation of secure, user-friendly forms/portals to collect data from clients that will smoothly feed into the fintech platform
- iii. Identify third-party services that will enhance the security, user-experience and efficiency and overall fintech platform
- iv. Ability to design forms that may include interactive calculations that will be output to the client as well as the participating contractor within the contractor portal.
- v. Integration with SELF's proprietary software and applications with the assistance of SELF's internal IT and Engineering Department
- vi. Integration with existing Salesforce APIs
- vii. Identification of ongoing 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 [selfrfp@solarenergyloanfund.org](mailto:selfrfp@solarenergyloanfund.org), Mitch Griesser ([mitchg@solarenergyloanfund.org](mailto:mitchg@solarenergyloanfund.org)), and Jacqueline Hudson ([jhudson@solarenergyloanfund.org](mailto:jhudson@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 Proposers(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	October 29, 2024
Proposer Questions Due to SELF	5 P.M. ET on November 4, 2024
SELF answers all Proposer Questions	November 6, 2024
RFP Proposals Due to SELF	5 P.M. ET on November 11, 2024

\* 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 Mitch Griesser (mitchg@solarenergyloandfund.org) and Jacqueline Hudson (jhudson@solarenergyloandfund.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.

**(Appendices and Attestations).** Before contract begins, the below must be signed by an individual authorized to legally represent the contracting organization:

- i. Attachment A – Federal Contract Provisions
- ii. Attachment B – Byrd Anti-Lobbying Certification
- iii. Attachment C – Certification of Diligence, Accuracy, and Completeness
- iv. Attachment D – Certificate of Independent Price Determination
- v. Attachment E – Sample Termination and Default

### **Attachment A - Required Terms and Conditions for Contracts Supported by Federal Funds**

The following terms and conditions are required to be included in any contract(s) awarded as a result of this solicitation that are supported by federal funds, in whole or in part, during the life of the contract(s). As used herein, “Contractor” shall refer to the selected Proposer and “contracting entity” shall refer to SELF.

#### **BUY USA - DOMESTIC PREFERENCE FOR PROCUREMENTS<sup>1</sup>**

1. Contractor should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in

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<sup>1</sup> Appendix II to 2 CFR Part 200, subsection (L); 2 CFR § 200.322.



all subawards including all contracts and purchase orders for work or products under this award.

2. For purposes of this section:
  - a. “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.
  - b. “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

### **BYRD ANTI-LOBBYING AMENDMENT, 31 U.S.C. § 1352 (AS AMENDED)<sup>2</sup>**

Contractors that apply or bid for an award exceeding \$100,000 shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier, up to the non-Federal award.

### **CLEAN AIR ACT AND WATER POLLUTIONS CONTROL ACT PROVISIONS<sup>3</sup>**

1. Contractor agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Federal Clean Air Act, as amended (42 U.S.C. § 7401 et seq.), and the Federal Water Pollution Control Act, as amended (33 U.S.C. § 1251 et seq.).
2. Contractor agrees to report each violation to the contracting entity and understands and agrees that the contracting entity will, in turn, report each violation as required to assure notification to the grantor federal agency and the appropriate Environmental Protection Agency Regional Office.
3. Contractor agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with federal assistance.

### **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (FOR ANY CONTRACTS IN EXCESS OF \$100,000 WHEN LABORERS OR MECHANICS ARE USED)<sup>4</sup>**

1. *Overtime requirements:* No Contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics

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<sup>2</sup> Appendix II to 2 CFR Part 200, subsection (I).

<sup>3</sup> Appendix II to 2 CFR Part 200, subsection (G).

<sup>4</sup> Appendix II to 2 CFR Part 200, subsection (E); 40 U.S.C. § 3702 and 3704.



shall require or permit any such laborer or mechanic, in any workweek in which he or she is employed on that work, to work more than forty hours in such a workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such a workweek.

2. *Violation: liability for unpaid wages; liquidated damages.* In the event of any violation of the clause set forth in paragraph (1) of this section, Contractor and any subcontractor responsible therefor shall be liable to the affected employee for the unpaid wages. In addition, such Contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory) for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic employed in violation of the clause set forth in paragraph (1) of this section, in the sum of \$10 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (1) of this section.
3. *Withholding for unpaid wages and liquidated damages.* The contracting entity shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by Contractor or subcontractor under any such contract or any other federal contract with the same Contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same Contractor, such sums as may be determined to be necessary to satisfy any liabilities of such Contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (2) of this section.
4. *Subcontracts.* Contractor or subcontractor shall insert in any subcontracts the clauses set forth in paragraphs (1) through (4) of this section and also a clause requiring the subcontractors to include these clauses in any lower-tier subcontracts. The prime Contractor shall be responsible for compliance by any subcontractor or lower-tier subcontractor with the clauses set forth in paragraphs (1) through (4) of this section.

#### **COPELAND “ANTI-KICKBACK” ACT PROVISION**

1. Contractor shall comply with 18 U.S.C. § 874, 40 U.S.C. § 3145, and the requirements of 29 C.F.R. Part 3 as may be applicable, which are incorporated by reference into this contract.
2. Contractor or subcontractor shall insert in any subcontracts the clause above and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime Contractor shall be responsible for the compliance by any subcontractor or lower tier subcontractor with all of these contract clauses.
3. A breach of the contract clauses above may be grounds for termination of the contract, and for debarment as a Contractor and subcontractor as provided in 29 C.F.R. § 5.12.



## **COPYRIGHT AND DATA RIGHTS (IF APPLICABLE)<sup>5</sup>**

1. Data, as used herein, shall include any work subject to copyright under 17 U.S.C. § 102, for example, any written reports or literary works, software and/or source code, music, choreography, pictures or images, graphics, sculptures, videos, motion pictures or other audiovisual works, sound and/or video recordings, and architectural works.
2. Contractor grants to the contracting entity, a paid-up, royalty-free, nonexclusive, irrevocable, worldwide license in data first produced in the performance of this contract to reproduce, publish, or otherwise use, including prepare derivative works, distribute copies to the public, and perform publicly and display publicly such data.
3. For data required by the contract but not first produced in the performance of this contract, the Contractor will identify such data and grant to the contracting entity or acquire on its behalf a license of the same scope as for data first produced in the performance of this contract.
4. Upon or before the completion of this contract, Contractor will deliver to the contracting entity data first produced in the performance of this contract and data required by the contract but not first produced in the performance of this contract in formats acceptable by the contracting entity.

## **FEDERAL COMPLIANCE**

Contractor acknowledges that Federal funds will be used to fund all or a portion of the contract. Contractor will comply with all applicable Federal law, regulations, executive orders, policies, procedures, and directives. This specifically includes, but is not limited to, all 2 CFR 200 requirements, and any Inflation Reduction Act (IRA) requirements and guidance established by the United States Department of the Treasury and/or the EPA for IRA funding. It also includes any legal requirements applicable to the Bipartisan Infrastructure Law, Greenhouse Gas Reduction Fund, and Urban Area Security Initiative (UASI) funding.

## **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT (HUAWEI AND ZTE) (IF APPLICABLE)<sup>6</sup>**

Contractor and any subcontractor are each prohibited from obligating or expending loan or grant funds to:

1. Procure or obtain;
2. Extend or renew a contract to procure or obtain; or
3. Enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a

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<sup>5</sup> 48 CFR § 27.409, 52.227-14.

<sup>6</sup> Appendix II to 2 CFR Part 200, subsection (K); 2 CFR § 200.216.



substantial or essential component of any system, or as critical technology as part of any system. As described in Public Law 115–232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).

- a. For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).
- b. Telecommunications or video surveillance services provided by such entities or using such equipment.
- c. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

### **PROCUREMENT OF RECOVERABLE MATERIALS<sup>7</sup>**

1. In the performance of this contract, Contractor shall make maximum use of products containing recovered materials that are EPA-designated items unless the product cannot be acquired—
  - a. Competitively within a timeframe providing for compliance with the contract performance schedule.
  - b. Meeting contract performance requirements; or
  - c. At a reasonable price.
2. Information about this requirement, along with the list of EPA-designated items, is available at EPA’s Comprehensive Procurement Guidelines webpage:  
<https://www.epa.gov/smm/comprehensive-procurement-guideline-cpg-program>
3. Contractor also agrees to comply with all other applicable requirements of Section 6002 of the Solid Waste Disposal Act.

### **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT (IF APPLICABLE)<sup>8</sup>**

Contracts or agreements for the substitution of parties, assignment, or performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401,

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<sup>7</sup> Appendix II to 2 CFR Part 200, subsection (J); 2 CFR § 200.323.

<sup>8</sup> Appendix II to 2 CFR Part 200, subsection (F).



“Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any applicable implementing regulations.

### **SUSPENSION OR DEBARMENT<sup>9</sup>**

1. No contract will be awarded to a Contractor or any party that is debarred from working on federally funded projects, as listed on the government-wide exclusions list in the System for Award Management (SAM) at [www.sam.gov](http://www.sam.gov), in accordance with the OMB guidelines at 2 C.F.R. Part 180.
2. This contract is a covered transaction for purposes of 2 C.F.R. Part 180 and 2 C.F.R. Part 3000. As such, Contractor is required to verify that none of Contractor’s principals (defined at 2 C.F.R. § 180.995) or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).
3. Contractor must comply with 2 C.F.R. Part 180, subpart C and 2 C.F.R. Part 3000, subpart C, and must include a requirement to comply with these regulations in any lower tier covered transaction it enters into.
4. This certification is a material representation of fact relied upon the contracting entity. If it is later determined that Contractor did not comply with 2 C.F.R. Part 180, subpart C and 2 C.F.R. Part 3000, subpart C, in addition to remedies available to the contracting entity, the Federal government may pursue available remedies, including but not limited to suspension and/or debarment.
5. The bidder or proposer agrees to comply with the requirements of 2 C.F.R. Part 180, subpart C and 2 C.F.R. Part 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer. The bidder or proposer further agrees to include a provision requiring such compliance in its lower tier covered transactions.

[Signature Page Follows]

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<sup>9</sup> Appendix II to 2 CFR Part 200, subsection (H).



**ACKNOWLEDGMENT AND CERTIFICATION:**

On behalf of [ NAME OF ORGANIZATION], I hereby:

- (1) acknowledge that the specific terms and conditions outlined in this Attachment A will be fully incorporated into any contract(s) awarded as a result of this solicitation that are supported by Federal funds, in whole or in part, during the life of the contract(s); and
- (2) commit to adhere to all relevant regulations, guidelines, and requirements outlined in this RFP and all Attachments contained within this RFP. Compliance with these regulations is crucial for maintaining the integrity of the qualification process and ensuring fair evaluation.

Name of Organization: \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION**





## **Attachment B - Byrd Anti-Lobbying Certification<sup>10</sup>**

### **BYRD ANTI-LOBBYING CERTIFICATION**

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents of all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The responding organization listed below certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the responding organization understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

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<sup>10</sup> Source:

<https://www.state.gov/key-topics-bureau-of-democracy-human-rights-and-labor/lobbying-disclosure-and-certification/>.



Solicitation Name: **[NAME OF SOLICITATION (ie. This RFP)]**

Responding Organization Name

Physical Address (Address, City, State, Zip Code)

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Signature of Organization's Authorized Official

Name and Title of Organization's Authorized Official

Date

**SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION**



## **Attachment C - Certification of Diligence, Accuracy, and Completeness**

### **CERTIFICATION OF DILIGENCE, ACCURACY, AND COMPLETENESS**

On behalf of [Name of Organization], I, [Your Full Name], hereby certify that I have exercised due diligence in the preparation of the response to this Request for Proposal (RFP). To the best of my knowledge and belief:

1. The information provided in the proposal is accurate and reflects the current state of our capabilities, qualifications, and offerings.
2. I have thoroughly reviewed and ensured the completeness of all required documents, including attachments and supporting materials.
3. All statements made in the proposal are truthful, and there is no intent to deceive or mislead the requesting entity.
4. The proposal complies with all guidelines, specifications, and requirements outlined in this RFP documentation.

I understand the importance of the accuracy and completeness of this submission, and I am committed to providing any additional information or clarification if requested.

Signature:

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Name:

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Title:

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Date:

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**SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION**



**Attachment D - Certificate of Independent Price Determination<sup>11</sup>**

**CERTIFICATE OF INDEPENDENT PRICE DETERMINATION**

I, [Your Full Name], on behalf of [Name of Organization], hereby certify, under penalty of perjury and to the best of my knowledge and belief, that:

The prices stated in our proposal submitted in response to the Request for Proposal (RFP) are arrived at independently, without collusion, consultation, communication, or agreement with any other competitor or potential competitor. The prices in this proposal have not been and will not be knowingly disclosed by us, directly or indirectly, to any other competitor contract award unless otherwise required by law.

No attempt has been made or will be made by us to induce any other organization or individual to submit or not to submit a proposal for the purpose of restricting competition.

The prices quoted are based solely on our independent judgment and analysis of the requirements specified in the RFP.

We have not received any information from the requesting entity that would affect the prices quoted in our proposal.

We are not aware of any actions or omissions that would impair the fairness of the competition or the integrity of the procurement process.

I understand the gravity of this certification and acknowledge that any false statement may lead to disqualification from consideration and potential legal consequences. I am responsible for determining the prices being offered in this RFP response, and I have not participated and will not participate in any action contrary to the certifications set forth above.

Signature:

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Name:

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Title:

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Date:

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<sup>11</sup> 48 CFR § 52.203-2.



**SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION**



## **Attachment E -- Sample Termination and Default**

### **SUSPENSION AND TERMINATION FOR DEFAULT**

Solar and Energy Loan Fund (SELF) may suspend Contractor's operations under the contract immediately by providing written notice of any default. Suspension shall continue until the default is remedied to SELF's reasonable satisfaction; *provided, however*, that, if after thirty (30) days from such a suspension notice Contractor remains in default, SELF may terminate Contractor's rights under the contract. All of Contractor's obligations to SELF shall survive termination of Contractor's rights under the contract, until such obligations have been fulfilled.

### **DEFAULT**

Each of the following events shall constitute default of the contract by Contractor:

- a. Contractor fails to perform or comply with any of the terms or conditions of the contract;
- b. Contractor breaches any covenant, representation or warranty provided herein; or
- c. Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary.

### **REMEDIES FOR DEFAULT**

SELF's rights to suspend and terminate Contractor's rights under the contract are in addition to all other available remedies. In the event of termination for default, SELF may exercise any remedy permitted by law.

### **TERMINATION FOR CONVENIENCE**

SELF may for convenience terminate the contract, subject to the following:

- a. Termination for convenience must be determined to be in the best interest of SELF (in SELF's sole and absolute discretion); and
- b. Contractor must be provided with thirty (30) days' written notice of the termination for convenience, unless SELF has made a written determination that a shorter notice period is in the best interest of SELF (in SELF's sole and absolute discretion).

The termination for convenience shall not relieve SELF from payment for goods and/or services already ordered and rendered as of the effective date of such notice. Contractor shall provide all documentation to support any outstanding expenditures through the effective date of the notice of termination. SELF may request additional documentation to support final payment. Unless otherwise specified above, SELF shall not have any further obligation or liability to Contractor.



## **TERMINATION FOR LACK OF FUNDING**

SELF may terminate a contract if funds are not appropriated to SELF or are otherwise not legally available for the purpose of making payments, without incurring any obligation for payment after the date of termination, regardless of the terms of the contract. SELF shall provide Contractor with thirty (30) calendar days written notice of termination, unless SELF has made a written determination that a shorter notice period is required.

## **GENERAL TERMINATION PROCEDURES**

After receipt of written notice of termination, Contractor shall take all steps necessary to minimize waste, including:

- a. Stop work immediately on the terminated portion of the contract;
- b. Terminate all subcontracts related to the terminated portion of the prime contract (if any);
- c. Perform the continued portion of the contract which is not terminated (if applicable);
- d. Take action to protect and preserve property in Contractor's possession in which SELF has or may acquire an interest, and, if directed by SELF, deliver the property to SELF;
- e. Deliver to SELF all tangible documents and other media, including any copies, containing, reflecting, incorporating, or based on the confidential information of SELF;
- f. Promptly notify SELF in writing of any legal proceedings resulting from any subcontract or other commitment related to the terminated portion of the contract;
- g. Settle outstanding liabilities and proposals arising out of the termination; and
- h. If there is a terminated construction contract, ensure the cleanup of the site, protection of serviceable materials, removal of hazards, and other actions necessary to leave a safe and healthful site.

**END OF DOCUMENT**