

District of Columbia
Department of Energy and Environment



**NOTICE OF FUNDING AVAILABILITY
AND
REQUEST FOR APPLICATIONS (RFA)**

Solar for All Subscriber Management
(Short name: SFA Subscriber Management)
RFA # 2019-1923-PCD

Publication Date: July 22, 2019

Application Deadline: August 27, 2019 at 4:30pm

Government of the District of Columbia
Department of Energy and Environment
1200 First Street, NE
5th Floor
Washington, DC 20002
(202) 535-2600



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SECTION 1. GENERAL INFORMATION

1.1 Introduction

The Department of Energy and Environment (DOEE) solicits grant applications from eligible entities (Applicants). The goal of this Request for Applications (RFA) is to find a solution to provide subscriber management services—including subscriber enrollment, subscriber maintenance, subscriber engagement, and subscriber support services—for the Community Renewable Energy Facility (CREF) projects funded by the District’s Solar for All (SFA) Program. The subscriber management services will ensure that SFA program benefits are fully realized by SFA CREF subscribers, improve subscriber understanding of and engagement with the SFA program, and aid in the efficient administration of the SFA program. The Policy and Compliance Division (PCD) of DOEE will administer this RFA.

1.2 Purpose of the Grants

The purpose of this grant is to provide high quality, cost-effective CREF subscriber management services for the SFA Program. Subscriber management is critical for securing the long-term benefits of solar energy, keeping participants in the program, and achieving high levels of participant engagement, understanding, and satisfaction with the SFA Program. A successful Applicant will achieve these objectives through the design and implementation of a subscriber management solution. The solution will serve District residents participating in the SFA program and have the flexibility to adapt to changing program needs and the ability to scale as the SFA program expands.

1.3 Source of Funds

The source of funds for the grant is:

Renewable Energy Development Fund (REDF)

1.4 Competition for a Grant Award

This RFA is competitive. Each Applicant must demonstrate its ability to carry out the activities for the grant for which it applies (project). A review panel will evaluate the applications for each advertised grant according to the stated list of criteria in each project’s description. The proposal/s with the highest score/s will be awarded the grant.

Specifically, grant awards will be made based on eligibility (Section 1.6), the extent to which the proposed project fits within the scope and available funding of the grant, strength of the application, and the organization’s capacity to achieve the grant’s goals.

Each Applicant may submit an application for more than one project, if applicable. If an Applicant responds to more than one project, it must do so in a separate proposal and submit all corresponding required documents.

1.5 Projects and Funds Available

DOEE seeks applications for:

Project Number	Project Name	Project Amount
1	Solar for All Subscriber Management	Not specified

The award value for this grant is not specified and applications will be evaluated based on the best value, past performance, viability, and completeness of the solution offered.

1.6 Eligibility

The following are eligible to apply if an “x” appears:

- ☒ -Nonprofit organizations, including those with IRS 501(c)(3) or 501(c)(4) determinations;
- ☒ -Faith-based organizations;
- ☐ -Government agencies;
- ☒ -Universities/educational institutions; and
- ☒ -Private Enterprises.

Continuing conditions of eligibility are that the information in the application is complete and truthful and that the Applicant at all times is able to meet any material conditions stated in its application. For instance, if an Applicant’s ability to fulfill the terms of the grant is based on the availability of skilled staff and those staff should leave after the application’s submittal or the grant award to the Applicant, the Applicant has the responsibility to advise DOEE in writing of this change in material conditions. Another example of change in material conditions that could result in the loss of eligibility would be the loss of the Applicant’s tax-exempt status.

An informational meeting/conference call and opportunity for question and answers will be held on **Wednesday, July 31, 2019, at 10:00 – 11:00 a.m.**

The location of the informational meeting will be:

**1200 First Street NE
Fifth Floor
Washington, DC 20002**

The conference number will be (877) 991-2481 and conference code is 8100841#

1.7 Definitions

District - The District of Columbia.

Grantee - The person provided a grant by the District, including a sub-grantee.

Person - A natural person or a legal entity, including a partnership, firm, association, joint venture, public or private corporation, trust, estate, commission, board, public or private institution, cooperative, the District government and its agencies, and the federal government and its agencies.

Writing - A tangible or electronic record of a communication or representation, including handwriting, typewriting, printing, photostat, fax, photography, word processing computer output, and email. A "signed" writing includes an electronic symbol or process attached to, or logically associated with a writing, and executed or adopted by a person with the intent to sign the writing.

1.8 Permissible Use of Grant Funds

A Grantee may use grant funds only for allowable grant project expenditures. Grant funds related to work performed will be provided on a reimbursement basis, except that an advance of funds may be provided for grant administration expenses in limited circumstances for good cause approved by DOEE at its sole discretion.

1.9 Grant Monitoring

In its sole discretion, DOEE may use several methods to monitor the grant, including site visits, periodic financial reports and the collection of performance data. Each grant is subject to audit.

1.10 General Terms and Conditions

Appendix 1, "General Terms and Conditions" is incorporated by reference in this RFA. Applicants and Grantees must comply with any and all applicable terms and conditions outlined in Appendix 1.

1.11 RFA Conditions - Promises, Certifications, Assertions, and Assurances

Appendix 2, "Applicant's Promises, Certifications, and Assurances" (PCA), is incorporated by reference in this RFA.

1.12 DOEE's Authority to Make Grants

DOEE has grant-making authority under:

- The Renewable Energy Portfolio Standard Act of 2004 (D.C. Law 15-340, D.C. Official Code §§ 34-1431-40), including § 34-1436(b) and (c)
- The Water Pollution Control Act of 1984, effective March 16, 1985, as amended, (D.C. Law 5-188; D.C. Official Code § 8-103.01 *et seq.*);
- The District Department of the Environment Establishment Act of 2005, effective February 15, 2006, as amended, (D.C. Law 16-51, D.C. Official Code § 8-151.01 *et seq.*);
- The Comprehensive Stormwater Management Enhancement Amendment Act of 2008, effective March 25, 2009, (D.C. Law 17-371; D.C. Official Code § 8-152.01 *et seq.*); and
- Other applicable laws and regulations.

1.13 Conflicts between RFA and Applicable Law

If any requirement of this RFA conflicts with a provision of any applicable law, including a District or federal law or regulation, the applicable legal provision shall control.

SECTION 2. SUBMISSION OF APPLICATION

2.1 RFA Release Date

The release date of this RFA is Monday, July 22.

2.2 Obtaining a Copy of the RFA

A person may obtain a copy of this RFA at doee.dc.gov or by requesting a copy through any of the methods listed in Section 2.6. Please add to any note the heading “RE: RFA 2019-1923-PCD.”

2.3 Applications: When, What, and Where

When: All applications must be received at the address below by August 27, 2019 at 4:30 p.m.

Applications will be dated and recorded as “received” pending review by DOEE for completeness. DOEE considers an application to be “filed” only if all the required materials are submitted. Late or incomplete applications will be considered received, not filed.

What: The contents of the Application are specified in Section 3. Each applicant must submit:

Five paper copies of the application; and

One electronic copy of the application.

DOEE will not receive faxed copies.

Where: The paper copies must be filed with DOEE at the following address:

District of Columbia Department of Energy and Environment

**RFA – Grants
1200 First Street NE
5th Floor
Washington, DC 20002**

Attn: RFA 2019-1923-PCD

Email an electronic copy, formatted as a .pdf file, to:

SubscriberManagementRFA.grants@dc.gov

2.4 Award Announcement

DOEE expects to notify each Applicant in writing of its award status within six to twelve weeks after the application due date.

2.5 Updates and Questions and Answers (Q & A)

Additional information may become available before the application is due. It is the Applicant's responsibility to stay up-to-date on the status and requirements of the grant for which it is applying.

DOEE welcomes questions seeking clarification of matters in this RFA. Questions about the RFA should be sent to SubscriberManagementRFA.grants@dc.gov with "RE: RFA 2019-1923-PCD" in the subject line.

DOEE will publish updates and Questions and Answers (Q&A) regarding the RFA at doee.dc.gov. DOEE will also create an email list to send updates and information regarding the RFA. A person can be put on the email list by immediately emailing SubscriberManagementRFA.grants@dc.gov with the subject line "RE: RFA 2019-1923-PCD – Add me to the email list."

DOEE will provide the information to those on the email list at the same time the information is uploaded to the DOEE website. Paper copy updates will be available for pickup at DOEE's offices by appointment. DOEE will not mail out updates or Q&A materials.

The cut-off date for receipt of any questions is one week prior to the application deadline.

2.6 DOEE Contacts

DOEE can be contacted about this RFA (use the RFA's short name and number whenever possible) by:

- (a) **Emailing** SubscriberManagementRFA.grants@dc.gov with "RE: RFA 2019-1923-PCD" in the subject line;
- (b) **In person** by making an appointment with Alex Lopez at (202) 673-6741 and mention this RFA by name; or
- (c) **Write** DOEE at 1200 First Street NE, 5th Floor, Washington, DC 20002, Attention: Alex Lopez RE: RFA 2019-1923-PCD on the envelope.

SECTION 3. APPLICATION CONTENT

3.1 Format

Proposals must be formatted as follows:

- (a) Use plain, white, 8 ½" x 11" recycled paper with one-inch margins.
- (b) Applications should be double-sided to the extent possible;
- (c) Limit each project description to 10 double-spaced pages. Budget tables, flowcharts, photographs, the work plan, and other supporting documentation may be attached in addition to the project description
- (d) Staple the application in the top left-hand corner. Do not use a plastic cover or other form of binding.

3.2 Proposal Content

DOEE intends to fund a project that will benefit the environment, and, in particular, the environment of the District. The proposal should use the following format and explain, in increasing levels of detail, how the Applicant will accomplish this.

(Note: Before drafting the proposal, please read the project description very carefully to see if there are restrictions for the DOEE grant. For instance, certain activities might be required to take place in the District or the scoring might give extra points to labor sourced in the District.)

(a) **Cover Sheet**

Include a cover sheet in the format specified in Appendix 3. Make certain that the funding amount requested on the cover sheet matches total amount requested in your budget and budget narrative.

(b) **Project Summary**

Provide a brief one paragraph summary that explains the project. This summary is not part of the 10-page proposal limit.

(c) **Project Description**

Organize this 10-page section of your application in accordance with the scoring rubric of section 7 of this RFA. As an exposition to the specific line items in the scoring rubric, state the following at the start of the proposal:

(1) **Purpose and Objectives**

State how this project will benefit the environment and the specific objectives this project will achieve.

(2) **Target Audience**

Identify the target audience. Who will this project engage? Who will benefit from the project?

(3) **Project Outcomes, Outputs, and Activities**

The proposal should connect the funded activities to quantifiable outputs and ultimately desired outcomes. This enables reviewers to evaluate what the proposed project will achieve if funded.

Activities are undertaken to achieve the outputs and outcomes. For example, a proposal could request funding to support a tree-planting activity in a city. This activity will yield a quantifiable output.

An **output** is a short-term result achieved as a result of an activity. For example, at the end of the project period, after several sessions of tree-planting, X number of trees will be in the city. This quantifiable output will yield various project outcomes.

A **project outcome** is a medium to long-term result that occurs and/or continues after the project ends. For example, after several sessions of tree-planting activities, this project yielded an output of X number of trees planted in the city. Medium to long-term outcomes of this project include: beautification of the city, increased environmental awareness of residents, and improved air quality.

(4) Methods

Describe how activities will be accomplished.

(5) Measurement of Project Success

Provide quantifiable measurements. For example, a tree planting project might measure the number and kinds of trees planted. A trash removal project might measure the pounds of trash removed. A stormwater project might measure the amount of stormwater captured.

(6) Project Budget

You must submit a numeric budget and a separate budget narrative as part of your application package. For the numeric budget, DOEE strongly urges applicants to use the budget template format provided (Appendix 4). The budget narrative must explain and justify every line item in the numeric budget. The explanation should be thorough enough to allow a reviewer to understand why expenditure levels were chosen and how the line item amounts were derived. For example: “personnel will be paid \$xx per hour times xx hours.”

If the Applicant seeks an advance payment, it must request advance payment in its proposal and explain why an advance payment is requested. See Section 6.2.

Resources provided by the applicant should appear in the column titled “Non-DOEE Match,” meaning the Applicant intends to provide the indicated resources (i.e., the “match,” and that the resources do not come from DOEE). Entries in this column could include both dollars and the value of the in-kind contributions. For example, in-kind contributions can include staff time, volunteer services, already-paid licensing fees, materials, supplies, and the use of equipment or real estate.

Volunteer hours provided to a grantee or sub-grantee must be valued at rates consistent with those the Applicant’s organization ordinarily pays for similar work, including salary and fringes. If the grantee or a sub-grantee does not have employees performing similar work, the rates must be valued the same as rates ordinarily paid by employers in the same labor market for similar work.

The Applicant must verify that all costs in the budget are allowable.

Typical allowable costs are:

1. Rental of office space, some vehicles, and some equipment;
2. Employee salaries and benefits;
3. Contractor labor, including professional services;
4. Accounting and bookkeeping services;
5. Communications, including telephone and data services;

6. Printing, reproduction, including signage;
7. Materials and supplies;
8. Computers and printers;
9. Small tools;
10. Some field equipment, typically below \$5,000 in value;
11. Postage and shipping;
12. Necessary travel, meals and lodging; and
13. Insurance.

Non-Allowable costs include:

1. Most major equipment, like vehicles;
2. Lobbying, including salaries and overheads and out-of-pocket expenses;
3. Entertainment;
4. Interest payments on loans;
5. Most food; and
6. Land purchases.

DOEE will require documentation for grant payments, and the entire grant will be subject to audit.

(d) Applicant

(1) Organization

Describe the organization's history, mission, and current or past projects that demonstrate the organization's capacity to achieve the project's goals. This section should be limited to one page. To provide further information, the Applicant can reference its website or attach organizational brochure or resume.

(2) Key personnel

Identify the key team members for the project and provide brief biographies or their resumes. The team members can be staff, volunteers or contractors.

(3) Past performance on District Grants/Contracts

Identify District agencies from which the Applicant has received funding as a contractor, grantee, or partner in the past five years and provide specific information including:

- The grant(s) or contract(s) title;
- The District agency/agencies;
- The grant number(s), contract number(s), or other identifier(s);
- The amount(s) paid; and
- What was accomplished as a result of the funding(s)?

Briefly describe any disputes, investigations, or audits related to any of these District grants or contracts, grants, or partnerships in the past five years.

(4) Partners

Sometimes partnerships can improve the success of a project. These partnerships might be with government agencies, nongovernmental organizations (NGOs), companies, or individuals. If a partner is to be involved in the project, the Applicant must describe the partner's involvement and resource commitments. The proposal must identify and attach a letter of support on the partner's letterhead, signed by an authorized official if the partner is a government agency, NGO, or business entity.

In lieu of a letter, an Applicant may attach an email from the partner (or an authorized official if the partner is a government agency, NGO, or business entity) that states support of the project and identifies the partner's name, address, website, and a contact name, telephone number, and email address.

For the following types of partners, provide the documentation indicated.

i. District of Columbia Public Schools

If the Applicant will work with the District of Columbia Public Schools (DCPS), it must include a letter of support from the principal of each school with which it will work, and, if available, from each participating teacher. Teachers and principals may send a joint letter.

ii. Property Owner

If the Applicant will work on public land, it must submit a letter of support from the managing agency. Similarly, if the Applicant is to work on private land, it must submit a letter of support from each property owner. If the project includes construction or installation, the letter must acknowledge that the property owner will be responsible (either directly or through an agreement with another entity) for project maintenance.

iii. Partnering Organization

If the Applicant has identified a project partner, it must include a letter of intent from the collaborating organization(s) agreeing to participate in the proposed project, describing the partner's involvement and resource commitments, and explaining the activities and/or services the partner will provide. The letter should demonstrate that the partnering organization understands the project presented for funding and the activities and/or services that the partner will provide. The Applicant must submit the partnering organization's Certificate of Good Standing (from the DC Department of Consumer and Regulatory Affairs) and documentation of the partner's tax exempt status.

iv. National Park Service

Projects that would be carried out on National Park Service (NPS) property will require NPS permission. Sometimes the paperwork supporting such permission takes extra time to complete. DOEE will accept more informal statements generated by responsible NPS officials, including emails.

3.3 Work Plan

The application must include a proposed work plan that describes the timeline for project implementation.

3.4 Required Documents

Each of the following documents must be filed as part of the proposal package. If the document is not in this filing, DOEE may classify the grant application as “received” but not “filed,” as specified in Section 2.3. However, if a government agency must issue a required document, and the Applicant has requested the document but not received it, DOEE may accept a copy of the Applicant’s request to the agency for the purpose of deeming the Application “filed.”

(a) Certificate of Good Standing

Each Applicant must submit a current Certificate of Good Standing from the District Department of Consumer and Regulatory Affairs. DOEE requires that the submitted Certificate of Good Standing reflect a date within a six-month period immediately preceding the application’s submission.

(b) Promises, Certifications, Assertions, and Assurances

Each Applicant must sign and submit the “Promises, Certifications, Assertions, and Assurances” (PCA) in Appendix 2. Signing the PCA is a condition of eligibility for this grant. If the Applicant is not prepared to sign the PCA, it should not apply for a grant. Compliance with the promises, certifications, and assurances in the PCA is a continuing condition of eligibility for this grant.

The PCA must be signed by the Applicant or, if the Applicant is an organization, by a duly authorized officer of the organization.

The PCA also includes a sworn statement verifying that the Applicant is not in arrears (i.e. is current) on any obligations outstanding to the District, including all District agencies. The Applicant must be current as of the date of the application and the date of a grant award. DOEE requires, as a condition of continuing eligibility, that a grantee stay current on such obligations during the period of the grant.

(c) IRS W-9 Tax Form

The Applicant must submit a current completed W-9 form prepared for the U.S. Internal Revenue Service (IRS). DOEE defines “current” to mean that the document was completed within the same calendar year as that of the application date.

(d) Tax Exemption Affirmation Letter

The tax exemption affirmation letter is the IRS’s determination letter of nonprofit status. If this letter is not available, then the Applicant should provide its most recent IRS Form 990 tax return, if one was submitted. If no return has yet been filed, the organization can submit its application for tax-exempt status. If the group has a supporting organization with an IRS tax-exempt status determination, then that organization’s tax exemption affirmation letter should also be submitted.

If there is no IRS tax exemption affirmation letter because the organization is a religious organization, then the Applicant may submit the best evidence it can of its status. Examples of potential best evidence for this purpose include, but are not limited to (i) a letter from the leader of the organization verifying that the organization is a religious group; (ii) a letter from the group’s board chair or similar official, verifying that the organization is a religious group; (iii) the Applicant’s most recently submitted state sales or other tax exemption form, if it exists (Form 164 in the District of Columbia); or (iv) the state’s issued tax exemption certificate or card, if it exists. (*See IRS publication no. 1828, Tax Guide for Churches and Religious Organizations.*)

(e) Applicant’s Current Fiscal Year Budget

The Applicant must submit its full budget, including projected income, for the current fiscal year, using a format at least as detailed as that presented in Appendix 4. Also, the Applicant should submit a comparison of budgeted versus actual income and expenses of the fiscal year to date.

(f) Applicant’s Financial Statements

If the Applicant has undergone an audit or financial review, it must provide the most recent audited financial statements or reviews. If audited financial statements or reviews are not available, the Applicant must provide its most recent complete year’s unaudited financial statements.

(g) Separation of Duties Policy

The Applicant must state how the organization separates financial transactions and duties among people within the organization in order to prevent fraud or waste. This may be a statement that already exists as a formal policy of the organization, or the Applicant may create the statement for purposes of the application. The applicant should state which of these situations apply.

This statement should:

- Describe how financial transactions are handled and recorded;
- Provide the names and titles of personnel involved in handling money;
- Identify how many signatures the financial institution(s) require on the organization's checks and withdrawal slips; and
- Address other limits on staff and board members' handling of the organization's money.

(h) System for Award Management (SAM) with federal government

If a project within this RFA is funded wholly or partially by federal funding sources, applicants for that project must be registered in the System for Award Management at www.sam.gov and provide evidence of this registration as part of its application package to DOEE.

(i) Partner Documents

The Applicant must submit the partnering organization's Certificate of Good Standing (from the DC Department of Consumer and Regulatory Affairs) and documentation of the partner's tax exempt status.

SECTION 4. Review Panel and Application Scoring

4.1 Review Panel

This is a competitive grant. The review panel for the RFA will be composed of individuals with knowledge in the areas directly related to the RFA. The review panel will review, score and rank each Applicant's proposal.

The panel will recommend the top scorer for award of the grant.

Review panels vary in size, but typically are made up of three to five people. At least two members of the review panel will be from DOEE staff. Whenever practicable, each panel will include at least one person from outside of DOEE.

4.2 Scoring Criteria

The reviewers score each proposal according to a list of criteria and the points available for each criterion. See section 7 of each project.

The applicant should read the grant description carefully to determine if matching funds or resources are required or if preference points are offered for matching funds.

SECTION 5. GRANTEE DOCUMENT REQUIREMENTS

5.1 Submissions If Applicant Will Receive the Grant

Upon acceptance of a grant award, the Grantee must provide the following documents.

(a) Certificate of Insurance

The Grantee shall submit a certificate of insurance giving evidence of the required coverage outlined in Appendix 1, General Terms and Conditions. DOEE will presume that the budget covers the cost of this required insurance and will not later adjust the grant award for this amount.

(b) Assurance of Continued Truth and Accuracy

Upon acceptance of the grant award the Grantee shall notify DOEE of any changes that may have occurred to its organization since the time of submission of its original application. See also Section 1.6.

SECTION 6. FILING REQUIREMENTS GENERAL PROVISIONS

6.1 Reporting Requirements

The grantee must submit the following reports as a condition of continuing eligibility for funding.

(a) Quarterly Status Reports

DOEE will provide a quarterly status report template with the grant award. These reports, which discuss grant activities for the preceding quarter, will be due on each of the following dates.

Quarter 1 (January - March):	April 15
Quarter 2 (April - June):	July 15
Quarter 3 (July - September):	October 15
Quarter 4 (October - December):	January 15

If a report's due date falls on a weekend or District holiday, the report will be due the next business day.

The report must detail: actions taken in the quarter preceding the report date, highlight outputs achieved, provide a financial update, and describe unforeseen changes to project timetable, staffing, or partnerships, as well as any other changes that may affect project outcomes.

(b) Final Report

DOEE will provide a final report template with the grant award. This report includes quantification by the grantee of the project's outputs and describes the extent to which project outcomes met or will meet the objectives of the funded proposal. The template requires submission of data and analysis of the data.

6.2 Reimbursement of Project Expenditures and Disbursement of Funds

DOEE will not reimburse the Grantee for any work undertaken before DOEE notifies the recipient of the final award of the grant.

DOEE will reimburse the Grantee only for expenditures incurred to perform work under the grant. In limited cases, DOEE may advance funds at the beginning of the grant period for good cause approved by DOEE at its sole discretion. If the Applicant seeks an advance payment, it must request such payment in its proposal and explain why an advance payment is being requested.

DOEE operates on the District's fiscal year, which starts October 1 of a calendar year and ends September 30 of the next calendar year. The grantee may submit a reimbursement request or an invoice at any time during the fiscal year for work performed within that same fiscal year. Each request/invoice must include supporting documentation.

Reimbursements will be mailed to the address on file for the grantee. DOEE may make electronic payments in lieu of mailing checks. DOEE generally pays grant invoices 30 days after DOEE receives them.

DOEE will withhold the final 10% invoiced under a grant until all required activities have been completed, including receipt of the final report.

SECTION 7. PROJECTS PROPOSED FOR GRANT FUNDING

7.1 Summary: Project Title and Available Funds

Project Name

Solar for All Subscriber Management (SFASM)

Introduction

The Solar for All (SFA) program was created by the Renewable Portfolio Standard Expansion Amendment Act of 2016 (D.C. Law 21-154; D.C. Official Code § 8-1774.16) (RPSEA Act) for the purpose of extending the economic benefits of solar energy to 100,000 low- and moderate-income (LMI) District residents by 2032. The SFA program Implementation Plan and program reports can be found at <https://doee.dc.gov/solarforall>.

DOEE is overseeing the construction of multiple Community Renewable Energy Facility (CREF) solar projects throughout the District funded by the REDF.¹ The electricity generated from these CREF projects will benefit LMI District residents through community net metering (CNM) credits on electric utility bills. Participants in the SFA CREF Program will receive CNM credits to reduce the participants' annual electricity bill.

The District of Columbia's Department of Energy and Environment (DOEE) solicits grant applications from eligible entities (Applicants). The goal of this RFA is to solicit innovative solutions to support low- and moderate-income (LMI) District residents by addressing the challenge of managing CREF subscribers for the Solar for All program, including subscriber enrollment, subscriber maintenance, subscriber engagement, and subscriber support services, as intended by the RPSEA Act. Subscriber maintenance involves maintaining subscriber rolls (quarterly updates to Pepco), working with subscribers to keep them in the program, conducting periodic income re-certification, and other related activities.

The SFA CREF pipeline will yield an approximate installed capacity and subscribers served according to the following schedule by the District of Columbia Government Fiscal Year (FY)²:

1 The term "CREF" is defined in Title 15 Chapter 9 of the District of Columbia Municipal Regulations, available: <https://dcregs.dc.gov/Common/DCMR/RuleList.aspx?ChapterNum=15-9&ChapterId=284>

2 The District of Columbia Fiscal Year begins on October 1 and ends on September 30. The dates of the applicable Fiscal Years are summarized in the table below:

Fiscal Year	Begin	End
FY 2019	October 1, 2018	September 30, 2019
FY 2020	October 1, 2019	September 30, 2020
FY 2021	October 1, 2020	September 30, 2021

SFA CREF Metrics	FY 2019*	FY 2020*	FY 2021*
Cumulative Installed CREF Capacity (MW)	8.0	13.7	19.9
Cumulative CREF Subscribers Served	2,749	4,442	6,208

* Estimates

DOEE will award one grant for the grant period stated below. The award amount for this grant is not specified. This RFA is a competitive application process, and applications will be evaluated on best value, past performance, viability, and completeness of the solution offered. See the Proposal Scoring subsection for additional details regarding evaluation criteria. The Policy and Compliance Division (PCD) of DOEE will administer this grant.

Project Period

The Project period begins on the date of DOEE's Notice of Grant Award to the selected Grantee and continues through September 30, 2020.

It is expected that the Grantee will complete a minimum viable solution for subscriber management that will be operational by November 1, 2019. The Grantee will develop the final project solution according to the timeline in the Project Work Plan.

Depending on the performance of the Grantee and the availability of funds, DOEE may, at its sole discretion, extend the grant period with additional funding for FY2021, FY2022, and FY2023.

Available Funding

The available funding for this grant opportunity is not specified. Matching funds are encouraged, but not required.

7.2 Project Description

Solar for All Subscriber Management (SFASM) Grant funds are to be used to provide subscriber management and related services to assist in the administration of the District's Solar for All Program.

As the implementing agency for SFA, DOEE is pursuing several strategies to deploy solar energy in the District. These strategies include rooftop solar for single-family, owner- or tenant-occupied households and community renewable energy facilities (CREFs) for households where rooftop solar is impractical (including multifamily units, renters, roof shading, etc.) and/or where CREFs are more cost-effective, and providing indirect solar benefits for residents of master-metered buildings. The SFASM Grant is focused on the CREF portion of the SFA Program.

The SFASM Applicant is expected to propose solutions for subscriber management services for two CREF programs, (1) the Oxon Run CREF and (2) the Solar for All CREF Program. The Oxon Run CREF is a 2.65 MW system being developed by DOEE in partnership with the

Department of General Services (DGS). The Oxon Run CREF will prioritize LMI subscribers in the vicinity of Oxon Run (Ward 8).

The SFA Multifamily Program encompasses multiple CREFs being developed by the District of Columbia Sustainable Energy Utility (DC SEU). Participants in the SFA Multifamily Program include income-qualified residents living in multifamily units, renters, and homeowners for whom rooftop solar is not feasible. DOEE is responsible for administering the SFA Multifamily Program. The selected SFASM Applicant will perform the activities described in this RFA for District residents participating in the SFA Multifamily Program.

The projected program metrics for the Oxon Run CREF and the Multifamily Program are summarized in the table below:

Program	Metric	FY19*	FY20*	FY21*
Oxon Run CREF	Cumulative Installed Capacity (MW)	2.65	2.65	2.65
	Cumulative Households Served	750	750	750
SFA Multifamily CREF	Cumulative Installed Capacity (MW)	7.0	11.0	17.2
	Cumulative Households Served	1,999	3,692	5,458
Total	Cumulative Installed Capacity (MW)	8.0	13.7	19.9
	Cumulative Households Served	2,749	4,442	6,208

* Estimates

SFASM Project Elements

The funded project will contain three required and two optional project elements. The required and optional project elements should collectively aid in the administration of the SFA CREF program and provide a cohesive experience to SFA CREF subscribers. The required and optional project elements are described below:

SFA CREF Subscriber Management (Required)

- Create and maintain a CREF subscriber database with key information related to SFA CREF subscriber households, including household information, income verification status, electric utility account number, CREF assignment and allocation.
- Manage CREF subscriber additions, deletions, and modifications, including all interface with the electric utility (Pepco).
- Manage CREF subscription allocations to ensure that each subscriber receives a percentage of the CREF production that reduces the subscriber's annual electricity bill by an amount specified by DOEE.
- Minimize the percentage of unallocated CREF generation.

- Monitor subscriber income verification status and income re-verification deadlines according to the Income Verification Guidance available at <https://doee.dc.gov/solarforall>.
- Input and track above information into the DOEE Solar for All Database.
- Provide DOEE with monthly reports listing current CREF assignment and allocation for each subscriber and all CREF subscriber additions, deletions, and modifications from the previous month.
- Inform DOEE whenever a subscriber is required to re-verify income eligibility in the next 3 months.

SFA CREF Subscriber Engagement (Required)

- The Grantee will develop and execute a strategy, subject to approval by DOEE, to engage subscribers throughout the program lifecycle. Important milestones which may trigger an engagement communication may include enrollment date, anniversary date, income re-verification, CREF termination, or other milestones identified by the Grantee or DOEE.
- Subscriber engagement should provide timely notification whenever a subscriber is required to take action to remain in the program, including income re-verification or authorization to change CREF assignment.
- Subscriber engagement should include educational messaging that communicates the economic and environmental benefits from continued participation in the Solar for All Program.

SFA CREF Subscriber Contact Center (Required)

The CREF Subscriber Contact Center should provide a single point of contact for subscribers to answer questions, resolve complaints, and process changes in participant status. The Subscriber Contact Center should at minimum include a call center, but may also include online chat, social media, or other relevant communications channels.

SFA CREF Subscriber Portal (Optional)

The Applicant may propose a user-authenticated CREF Subscriber Portal where subscribers can access relevant program information, including, but not limited to:

- CREF allocation percentage;
- Historic CNM credit and monetary benefit accrual;
- Forecasts for future CNM credit and monetary benefit accrual;
- Educational materials about community solar; and
- Tools for program self-service.

SFA CREF Business Intelligence Portal (Optional)

The Grantee may propose a SFA CREF Business Intelligence (BI) Portal for use by DOEE to monitor key SFA program metrics, including CREF subscriber rolls and allocation, CREF generation and CNM credits, subscriber income verification status, and other business analytics data.

The BI Portal data should be exportable in a common file format, such as a CSV file format.

Evaluation of Application Program Elements

In evaluating competing applications, points will be awarded if an application fulfills each of the required project elements. Additional points will be awarded to applications that include the optional project elements provided that the optional project elements are integrated with the overall project and enhance the subscriber management service delivery model.

Applicants may propose multiple budgets to reflect solution approaches with or without the optional project elements.

7.3 Project Outcomes, Outputs, and Deliverables

Project Outcomes

The Subscriber Management Project shall accomplish the following outcomes:

1. Ensure that program benefits are fully realized by participants according to the terms of the SFA program;
2. Aid in the efficient administration of the SFA CREF program and contribute to achieving the intent of the law of reducing electricity bills by 50 percent for 100,000 LMI District residents;
3. Improve subscriber understanding of and engagement with the SFA program, resulting in higher program satisfaction and participant retention;
4. Identify and resolve questions and concerns from SFA CREF subscribers regarding program participation and benefits; and
5. Work with DOEE for continuous improvement of the subscriber management process, the subscriber experience, and the overall SFA CREF program.

Project Outputs

During the project period, the Grantee shall accomplish the following outputs:

SFA CREF Subscription Maintenance

1. Maintain a minimum subscriber allocation as a percentage of total CREF production over each quarter, subject to the availability of eligible subscribers;
2. Maintain at minimum two subscribers for each CREF at all times, subject to the availability of eligible subscribers;
3. Allocate each subscriber a percentage of the CREF production to reduce the subscriber's annual electricity bill by an amount specified by DOEE;
4. Ensure that no subscribers' share of CREF production has offset more than 120 percent of the subscriber's electricity consumption over the previous 12 billing months; and
5. Ensure subscriber information is tracked and maintained in the DOEE Solar for All Database.

SFA CREF Subscriber Engagement

1. Provide each subscriber with periodic communications that are engaging, relevant, and personalized and administered through an appropriate delivery channel (postal mail, email, etc.). The timing, content, and sequencing of subscriber communications will be developed in coordination with DOEE and may align with important program milestones (e.g., first bill credit, anniversary date, or season change); and
2. Provide each subscriber with income re-verification notifications in advance of income re-verification deadlines. The timing, content, and sequencing of the income re-verification letters will be developed in coordination with DOEE.

SFA CREF Subscriber Contact Center

1. Maintain a contact center with capacity and operating hours sufficient to respond to subscriber questions or concerns; and
2. Report key metrics for the contact center to DOEE on quarterly basis. These metrics will be developed in coordination with DOEE and may include call volume, call escalation volume, and first call resolution.

If the successful application includes the *optional* project elements, the Grantee shall further accomplish the following outputs:

SFA CREF Subscriber Portal

1. Provide each subscriber with access to a user-authenticated web portal that includes personalized information relevant to their SFA CREF subscription; and
2. Report key web portal metrics to DOEE on a quarterly basis. These metrics will be developed in coordination with DOEE and may include unique user sessions, average number of sessions per user, and average time per session.

SFA CREF Business Intelligence Tool

1. Provide a Business Intelligence (BI) tool for use by DOEE SFA program staff to monitor the SFA CREF program, including the application of SFA CREF program benefits to District residents.

Deliverables

During the project period, the Grantee shall complete the following project deliverables:

1. **Project Work Plan**: The Project Work Plan should outline the schedule for development, implementation, and delivery of the subscriber management services, including the identification of key project milestones. The Project Work Plan will be developed as a collaborative effort between DOEE and the Grantee. The Project Work Plan must be delivered to and approved by DOEE before further work can begin;
2. **Project Status Meetings**: Participate in regular Status Meetings with DOEE to discuss actions taken, progress against the work plan, and project next steps. The cadence of the Status Meetings will be determined by DOEE and agreed upon by the Grantee;
3. **SFA CREF Subscriber Management Services**: Implement, deliver, and maintain the systems and processes necessary to deliver the SFA Subscriber Management Services described in the Project Description section of this RFA;
4. **SFA CREF Subscriber Engagement Services**: Implement, deliver, and maintain the systems and processes necessary to deliver the SFA Subscriber Engagement Services described in the Project Description section of this RFA; and
5. **SFA CREF Subscriber Contact Center**: Setup and maintain a contact center for SFA CREF subscribers in line with the SFA CREF Subscriber Contact Center described in the Project Description section of this RFA.

If the successful application includes the *optional* project elements, the Grantee shall further complete the following deliverables:

6. **SFA CREF Subscriber Portal**: Implement, deliver, and maintain the systems and processes necessary to deliver the optional SFA CREF Subscriber Portal described in the Project Description section of this RFA; and
7. **SFA CREF Business Intelligence Portal**: Implement, deliver, and maintain the systems and processes necessary to deliver the optional SFA CREF Business Intelligence Portal described in the Project Description section of this RFA.

Proposal Scoring

All proposals will be scored according to the criteria below.

No.	Scoring Criteria	Points
1	Applicant's total cost to perform the services proposed is the best value for the District. Applicant presents a detailed budget and budget narrative that includes a clear justification for the funds requested. The budget is entirely compatible with the services proposed, including optional project elements, if any.	20
2	Applicant demonstrates experience managing grant funds and completing financial reporting requirements.	5
3	The application includes matching funds and/or in-kind contributions.	5
4	Applicant proposes a comprehensive and credible plan for delivering subscriber management services – including each of the required project elements – that meet the needs described in this RFA. Approach is innovative, flexible, and scalable and capable of growing with the SFA CREF Program. If the Application includes one or more of the optional project elements, these project elements are cohesively integrated and add value to the overall project.	20
5	Applicant demonstrates a track record of successfully delivering subscriber management services for CREF or community solar projects (Appendix 8).	20
6	Applicant demonstrates substantial knowledge and experience with the rules and regulations governing CREFs in the District and the DOEE Solar for All Program (Appendix 8).	10
7	Applicant demonstrates experience engaging with low- and moderate-income individuals, including LMI District residents, about the financial and environmental benefits of solar energy. ³	10
8	Applicant has the personnel and resources to carry out the project described in the application. Application includes an organizational chart and resumes of key personnel.	10

³ For the purposes of this RFA, and the SFA Program, LMI is defined as households at or below 80% of the area median income (AMI).

Additional points will be awarded to Applicants that meet the following criteria:

No.	Scoring Criteria	Additional Points
9	<p>Applicant is a private enterprise with Certified Business Entity (CBE) certification. Points for this category will be determined by CBE point matrix maintained by the Department of Small and Local Business Development, available here: https://dslbd.dc.gov/page/certification-faqs. Note: Applicants seeking to qualify for these additional points must include proof of CBE certification with their application (Appendix 5).</p>	12
10	<p>Applicant is a private enterprise or nonprofit organization, including those with IRS 501(c)(3) or 501(c)(4) determinations, that meets the following criteria:</p> <ul style="list-style-type: none"> • The principal office organization is located in the District of Columbia; and • The chief executive officer and the highest level managerial employees of the organization perform their managerial functions in their principal office located in the District. <p>Note: Applicants seeking to qualify for these additional points must include proof of qualification with their application (Appendix 5). Points for being a local entity cannot be combined with points for being a CBE.</p>	6

SECTION 8. CHECKLIST FOR APPLICANTS

<p>Instructions for applicants: Ensure that the answers to all of the questions below are answered. In the column to the right, indicate Yes, No, or NA for not applicable. Include this completed document with application submission.</p>		
1.	Is the cover sheet (appendix 3) completed and signed – and included as part of the application?	
2.	Is a Table of Contents included in the application?	
3.	Is the applying organization eligible for funding from DOEE according to section 1.6 of the RFA?	
4.	Is the proposal formatted in accordance with section 3.1 of the RFA?	
5.	Does the proposal include a project description and all of the information required of the scoring rubric outlined in section 7 of the RFA?	
6.	Is a numeric budget and budget narrative justifying each line item, included in the application?	
7.	Do the line items in the proposal budget consider the allowable and non-allowable costs in section 3.2 of the RFA?	
8.	Does the application package include the first page and signed last page of the DOEE Promises, Certifications, Assertions, and Assurances?	
9.	Does the application package include a Certificate of Good Standing that reflects a date within 6 months of the deadline date?	
10.	Does the application package include IRS W-9 Tax Form?	
11.	Does the application package include a Tax Exemption Affirmation Letter?	
12.	Does the application package include the applicant's current fiscal year budget?	
13.	Does the application package include the applicant's most recent audited financial statements?	

14.	Does the application package include a Separation of Duties Policy as described in section 3.4.g. of the RFA?	
15.	Is the applicant registered in the System for Award Management (SAM)?	
16.	If applicable, does the application package include letters of support from other entities?	
17.	If applicable, does the application include resumes of key personnel mentioned in the proposal?	
18.	Are responses to Appendix 8 included?	

APPENDICES

Appendix 1 – General Terms and Conditions

Appendix 2 – Promises, Certifications, Assertions, and Assurances

Appendix 3 – Cover Sheet

Appendix 4 – Example of Grant Budget

Appendix 5 – Points for Local Entities

Appendix 6 – Information Technology, Data Collection, and Management

Appendix 7 – Continuity of Services

Appendix 8 – Additional Questions