Hope Enterprise Corporation

Request for Proposals

Engineering Technical Assistance Services

*** updated 6.18.2025 to include Questions and Answers ***

Purpose of Engineering Technical Assistance RFP

Hope Enterprise Corporation (HEC) is seeking qualified engineering partners to provide technical assistance in support of HEC's financing of solar energy and battery storage projects for solar installers serving residential households and other commercial enterprises in Arkansas and Mississippi.

This RFP aims to identify partners capable of supporting HEC's mission to enhance financial health and wealth in historically under-resourced Deep South communities through renewable energy projects. The selected engineering partner(s) will play a crucial role in project underwriting, implementation, and long-term system monitoring – ensuring compliance with federal, state, and local laws and solar lending program requirements while maximizing outcomes and savings for the residential households and commercial enterprises served by the program.

Statement of Funding

This project is being supported, in whole or in part, by federal award number (FAIN) 84091501 and 84091401, both awarded to Hope Enterprise Corp. by the EPA.

Overview

HEC Solar for All Program

As a grantee of the Environmental Protection Agency's (EPA) Solar for All (SFA) program, HEC is committed to reducing electricity costs by at least 20% for residential households in low-income and disadvantaged communities (LIDACs). SFA will be central to HEC's commercial solar lending platform, but not all loans will be SFA-specific. For purposes of this RFP, respondents should address commercial solar financing generally, as there are no engineering-related parameters unique to SFA.

Solar Project Types and Cost Proposal Structure

HEC will deploy its Solar for All grants and other commercial solar lending resources by providing project financing to developers and/or owners of solar projects. The solar project types will include community solar, multifamily solar, and single-family residential solar leasing (i.e., not loans directly to households for residential solar). The chosen engineering partner(s) will primarily consult on community and multifamily solar projects, which will take the form of construction-to-permanent loans, ITC bridge loans, and, where applicable, unique SFA forgivable loans.

HEC would also like to consider proposals that include assistance for monitoring and auditing its residential solar leasing program as needed. Those installations will mostly be managed through a solar leasing partner and financed through a warehouse facility from which the leasing business may borrow to fund residential customer installations.

Scope of Work

The selected engineering partner(s) will provide a comprehensive range of technical assistance services to support project development, execution, and ongoing monitoring. Key responsibilities include:

1. **Technical Assessment of Projects During the Underwriting Phase (Front-End Due Diligence)**
    - Support system design evaluation, including solar layout & design, interconnection feasibility, and storage integration.
    - Evaluate sites, solar resource outputs, and developer-submitted technical studies.
    - Provide technical validation for project financial models, ensuring assumptions are realistic and within current market ranges.
    - Assessment of contractor and supplier selection, including qualification verification and compliance.
    - Advise HEC on appropriate construction and loan disbursement schedules based on the technical aspects of the project.
    - IREE certification for projects with energy-efficiency components
2. **Construction Phase Oversight**
    - Perform site inspections, approve draw packages, change orders, and updates to schedules of values.
    - Verify and sign off on construction milestones to ensure timely project execution.
    - Observe or conduct system testing upon project completion.
    - Advise HEC on appropriate capital reserve requirements at conversion to permanent/operational phase.
3. **Continued System Performance Monitoring and Ongoing Support**
    - Review system performance reports to ensure household savings and troubleshoot underperformance issues with HEC and/or the Sponsor.
    - Approve Operations and Maintenance (O&M) provider qualifications and selection and ensure plans align with long-term system viability.
    - Provide ongoing quality control support to HEC portfolio management staff.
    - Provide ongoing engineering and other energy audit services, e.g. spot checks of solar installations, to HEC staff to ensure compliance with program regulations, including household savings requirements.

Qualifications and Additional Offerings

Engineering Partner Qualifications

HEC seeks engineering partners with the following qualifications:

- Identify and provide professional qualifications for:

    - (a) at least one certified Professional Engineer (Electrical) who will serve as supervising engineer,
    - (b) all other certified Professional Engineers and their discipline(s), and
    - (c) each other staff member who may have responsibility for all or part of the above scope of work.
- For the respondent and the supervising P.E., a minimum of four years of experience serving as an independent engineer and/or owner's rep in commercial solar and storage project development.
    - *Experience in Arkansas and/or Mississippi will be highly valued.*
- Strong knowledge of local, state, and federal solar and storage regulations and requirements, as well as energy project finance products, modeling, and practices as they relate to technical aspects of project development.
- Specific experience in each aspect of the Scope of Work.

Additional Service Offerings

Firms with expertise in the following areas are encouraged to highlight these capabilities. If the above essential qualifications are met, experience in these additional service offerings will strengthen a respondent's proposal:

- Experience with project and interconnection design that complies with and maximizes the advantages of state-level net metering regime, grid interconnection processes, and behind-the-meter allowances.
- Integration of storage technologies with project design, microgrid projects, and, where applicable, access to ancillary service revenue.

Each additional service area must be accompanied by at least one specific project example demonstrating the firm's experience in that service area.

Response Components and Evaluation Criteria

RFP Response Instructions and Components

HEC requests that all proposal materials be sent via email in a single zip file to thelman.boyd@hope-ec.org and solarforall@hope-ec.org with the subject line: "Engineering Technical Assistance RFP Response - [Organization Name]".

Responses must be received no later than 5:00 p.m. U.S. Central Time on Monday, June 30, 2025. HEC reserves the right to extend the deadline or reopen the RFP if necessary.

A complete response must include the following components:

1. Executive Summary

- Brief overview of the firm's qualifications, expertise, and relevant project experience.

2. Technical Proposal
    - Narrative detailing the firm's approach to the outlined scope of work and, if applicable, additional services.
    - Description of personnel and their relevant experience.
    - Sample solar/storage assessment demonstrating capabilities.
        i. *Preference for sample projects that are behind-the-meter or net-metered, as grid-serving projects are less applicable to HEC's commercial solar lending generally and to the SFA program specifically.*
3. Cost Proposal
    - Budget with itemized cost breakdown for services, including per-project costs for:
        i. Underwriting support
        ii. Construction phase support
        iii. Continued system performance monitoring
    - Separate pricing for community solar, multifamily solar, and residential solar installation/leasing projects, if applicable.
        i. For community and multifamily solar, please state pricing on a per-project basis
        ii. For single-family residential solar projects, please state your approach to monitoring and auditing a leasing business with multiple projects. For example, how might you conduct spot checks on specific projects?
    - Capacity constraints for any services, e.g., technical review of residential rooftop proposals
    - Process for evaluating the cost of more ad hoc requests from HEC
    - Discounted rates for nonprofit or government projects, if applicable.
4. References
    - Contact information for at least three past clients from similar services.

Evaluation Criteria

Proposals will be evaluated based on the following weighted criteria:

- Technical Approach & Expertise (40%) – Ability to assist with technical aspects of underwriting, lender's rep and construction management, and monitoring performance.
- Past Experience (20%) – Demonstrated success in similar commercial solar and storage projects, particularly in the states of Arkansas and/or Mississippi.
- Capacity & Capability (20%) – Financial stability, key personnel qualifications, and sufficient staffing and the ability to manage multiple projects and project types and scale.
- Cost Proposal (20%) – Competitive pricing with preference for per-project payment structure and/or discounts for government or nonprofit owners.

Additional Requirements and Contact Information

Right to Reject

HEC reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP.

Additional Terms and Conditions

Any notice of award issued under this RFP will include additional terms and conditions. For example, a notice of award may include terms and conditions that require successful completion of HEC's loan origination process, which is not governed by this RFP and requires additional steps and negotiation of terms outside the scope of this RFP.

Any agreement with HEC shall include terms and conditions acceptable to HEC that define rights and remedies of the selected lessor and HEC as a result of the performance or non-performance of third-parties, such as EPA, under all applicable contracts and law.

Additional Requirements

DUNS and System for Award Management (SAM) Registration

All contractors receiving federal funds through Solar for All must have or obtain an active account in the System for Award Management (SAM). The website and information on how to create a user account is found at https://www.sam.gov/SAM/.

To receive payment from a federal award, contractors must not have active exclusions or delinquent federal debt and may not be currently debarred, suspended, proposed for debarment, or declared ineligible for awards by any federal agency (Learn more here).

Additionally, please make sure that your sub-contractors who receive federal funds are aware that they must have a DUNS number and be registered in SAM in order to be in compliance with federal reporting requirements.

Federal Funding Accountability and Transparency Act (FFATA)

Consultants must comply (as applicable) with FFATA and provide necessary information to enable HEC to comply with FFATA reporting requirements. Please visit http://www.fsrs.gov for more information.

High Rate Limitation

HEC may not provide reimbursement for payment of the salary of a consultant at more than the daily equivalent of the rate paid for level IV of the Executive Schedule. For more information on

the Executive Schedule, please see the Office of Personnel Management (OPM) website at https://www.opm.gov/policy-data-oversight/pay-leave/salaries-wages/2018/executive -senior-level. In order to verify this requirement is being met, HEC may require additional information regarding a breakout of direct and indirect expenses within budgets and rates.

Byrd Anti-Lobbying Certification

Selected respondents will be required to complete a certification form to ensure compliance with the Byrd Anti-Lobbying Amendment (31 CFR Part 21, 31 U.S.C. 1352). This requirement applies to contracts to nonfederal entities (recipients, subrecipients, and contractors) valued at more than $100,000 and which are funded, fully or partially, through any federal award, such as federal grants. With this form, contractors or subcontractors must certify and disclose their lobbying activity compliance. 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. See EPA Form 6600-06 for an example of the certification form.

Contact Information

For any questions related to this RFP, please contact solarforall@hope-ec.org.

HEC looks forward to reviewing proposals from qualified engineering partners who share our vision of expanding renewable energy access and improving economic opportunities in underserved communities.

Questions & Answers

Updated 6.4.2025 and 6.18.2025

Q - **What would HEC like to see included in engineering reports for the community solar and multifamily solar projects?**

A – HEC needs the following to be included:

- Engineering design review
    - Solar production at P99/P50 (required)
    - Likely degradation (required)
    - Compliance with interconnection requirements (required)
- Equipment review (required)

In some instances, HEC may benefit from the following:

- Site review (geotech, environmental, etc.)
- Contracts review (IX, EPC, etc.)

- Analysis of construction schedule and budget
- Permitting scope
- Financial analysis (capex budget and operating proforma, covering solar production, degradation, opex, etc.)

Q - **Does Hope Enterprise Corporations (HEC) have a number or quantity of residential, multi-family, and community solar projects and/or customers that will need to be serviced? If so, what are these quantities?**

A – HEC's workplans for Arkansas and Mississippi include solar capacity deployment estimates as follows.

Arkansas

Type	Capacity Deployed (MW)	# of Projects	Capacity per Project
Residential Leases	5.6	1,116	5 kw
Community Solar	8.2	8	1 MW
Multifamily	4	12	.36 MW

Mississippi

Type	Capacity Deployed (MW)	# of Projects	Capacity per Project
Residential Leases	4	791	5kw
Community Solar	8	8	1 MW
Multifamily	3.1	8	.36 MW

Q - **Is there a percentage or quantity of installations that require the battery storage component?**

A – No. Battery storage is optional for many project types and not required.

Q - **With regards to the engineering technical assistance scope of work, is this scope of work expected to be delivered on by [redacted] for the engineering review and approval of drawings from third party designers, or are engineering services expected to develop and provide these designs for residential, multi-family, and community solar?**

A – The scope of work does not include developing or providing designs for any projects. Rather, the selected engineering partner will support assessment of designs that are proposed for funding.

Q - **How will the two states (AR and MS) roll out the programs in terms of timelines? Will these programs be deployed in phases or simultaneously?**

A – HEC anticipates offering financial assistance to projects that would benefit from independent engineer support in 2025.

In terms of next steps, for the multifamily and community solar program, HEC expects to publish an RFP in the near future. Those proposals will be evaluated, with selected proposals receiving a conditional notice of award and moving into full commercial loan underwriting.

For its residential solar leasing program, HEC is in the process of evaluating solar leasing partners. After selecting its partner, HEC and its leasing partner will focus on launch.

Q - **What is the anticipated award day after proposals are received and evaluated?**

A – The typical evaluation timeline is several weeks from the submission deadline to notice of award, depending on the volume of responses and additional fact-finding and assessment, which may result in a longer evaluation period.

Q - **Is there a consideration for price increases year to year and how they might impact service fees? For example, would an escalation clause be appropriate to include in our proposal? Or, would a consideration of a 1-year contract with options component come into play?**

A – When evaluating proposals, HEC will consider pricing as weighted criteria. To be considered complete, responses must include all costs as part of the itemized cost breakdown. Responses may include additional information about costs.

Q - **Does HEC have an Engineer of Record on staff or contracted for the Program already?**

A - No

Q - **What power output is HEC anticipating that would be associated with the multi-family and community solar projects? For example, we are assuming these projects will be in the Kilowatt output size as opposed to the Megawatt output range.**

A – Community Solar projects cannot exceed 5 MW nameplate capacity.

Q - **From your RFP Response Instruction section, it states the following: Separate pricing for community solar, multifamily solar, and residential solar installation/leasing projects, if applicable. For community and multifamily solar, please state pricing on a per- project basis. What general parameters can you provide?**

For example, what are the number of kilowatts that you expect the system to produce?

A – Please see estimates in the capacity table provided above.

Would the panels be installed on grade level as opposed to a rooftop?

A – Rooftop and ground-mount are both acceptable.

Should the system accommodate battery storage components or not, etc.?

A – HEC's financial assistance can be used to support battery storage in some situations.

Q – **Regarding the IREE credentials, does HEC have the expectation that the provider would be assuring that leasing companies and/or installing contractors either have or are in compliance with the application of IREE protocols and practices?**

A – HEC believes savings projections resulting from energy-efficiency components of a project with IREE certification are more predictable. While IREE certification is not a project requirement, a third-party's familiarity and ability to verify conformity against this standard will be viewed favorably.

Q - **Ad Hoc services. Are there particular areas of concern or requirements which are at the basis for this request?**

A – HEC encourages firms responding to this prompt to provide examples that highlight experience supporting interconnecting projects in AR and MS and experience with battery storage.

Q - **Does HEC have the solar leasing companies and partners in place already? If not, what are the requirements and qualifications that HEC is looking for in the solar leasing partner?**

A – The deadline to submit proposals to HEC's RFP for solar leasing services has passed.