



REQUEST FOR PROPOSAL (RFP) for Technical Assistance Services

Release Date: December 4, 2024

Proposal Due Date: open

Selection Date: on-going

Contract Period: open

The Green Bank for Rural America seeks Technical Assistance Service Providers (“TA Providers”) who are qualified to support Community Lenders, project developers, businesses, and local leaders undertaking new energy projects in rural America. Qualified TA Providers may also enter into a Master Service Agreement facilitating the provision of assistance to target projects. This is a rolling RFP and qualification process, and TA Providers are welcome to provide submissions at any time. TA Providers should respond using the TA RFP Response Form and provide required attachments defined in section F below.

The Green Bank for Rural America will make Capitalization and Technical Assistance awards (grants) totaling \$450 million to selected lenders (“Community Lenders”) serving priority communities in Appalachia, energy communities, and rural communities of color and Native communities. These awards will be made through a competitive application process. The Green Bank will allocate \$400 million to Community Lenders in capitalization awards. In addition, \$50 million will be made available to provide Technical Assistance (“TA”) supporting Community Lenders in sourcing and investing in new energy projects in rural America.

A. Technical Assistance Needs

The Green Bank is conducting this solicitation to select service providers with the expertise and experience to provide support to Community Lenders, project developers, businesses, and local leaders undertaking new energy projects in rural America. Once selected by the Green Bank, a Qualified TA Provider will be identified as a resource that can then enter into contracts for services. A Qualified TA Provider will have the option of entering into a Master Service Agreement with the Green Bank, or contracting directly with the Community Lender or other parties for services.

The Green Bank is seeking proposals from qualified organizations with expertise and experience in the following areas;

- 1) High Performance Buildings;

- 2) Distributed Energy Generation and Storage;
- 3) Zero-Emission Transportation;
- 4) Financing Strategies;
- 5) Community Engagement, and,
- 6) Workforce Development.

Please see the RFP Response Form for a listing of the types of services requested for each of these areas.

The Green Bank will screen all proposals and select appropriate service providers to be included in a database of qualified TA Resources available through our Technical Assistance Hubs. Qualified TA Assistance providers may be for profit service providers, non-profit organizations, and public agencies.

This RFP provides background on the Green Bank for Rural America and details on the targeted types of projects and communities that meet eligibility criteria. Respondents should include information about their experience in the targeted subject matter areas and highlight their experience with projects in the target regions.

B. Green Bank for Rural America Vision and Goals

Appalachian Community Capital started the Green Bank for Rural America to help rural areas gain the most benefit from the new energy economy. Rural energy communities in Appalachia and across the country have been the heart of energy production in America, powering the growth of our nation. The Green Bank aims to build upon and revitalize this spirit, working alongside communities to build resilient local economies and to create new opportunities for a prosperous future.

The Green Bank will make investments— beginning with a \$500 million award from the U.S. Environmental Protection Agency – to connect rural communities to new sources of financing. The EPA award will help attract even more private capital, for an estimated \$1.6 billion into 2,000 diversified energy projects. This means 13,000 good jobs and a way to preserve the quality of life in rural communities, where local businesses and community leaders work together to control their future.

These investments will:

- Create **good jobs** that stay in rural communities, helping local communities thrive.
- Help families and businesses save and **build wealth** and increase profitability – creating a prosperous future.
- Create **healthier communities** and preserve the quality of life in rural areas.

The Green Bank for Rural America will prioritize investments in 582 counties in Appalachia, energy communities, and rural communities of color and Native communities. Financing and technical assistance will be available in all eligible rural areas nationwide.

With the award from EPA, the Green Bank will award investment capital to a network of Community Lenders to catalyze the next generation energy economy. These lenders include: US Treasury CDFIs, US EDA Revolving Loan Funds, USDA Intermediary Relending Funds, and other public and non-profit lenders.

Appalachian Community Capital and Green Bank for Rural America are also raising two funds, seeking program related investments (PRIs), mission-related investments (MRIs), and grants, to support investing in rural America during and beyond the EPA award timeframe. Powering Rural Opportunities (PRO Fund) will finance projects that fall outside EPA guidelines; and a Participation Facility will provide additional capital for Community Lenders in both EPA and non-EPA eligible projects.

Green Bank for Rural America's Use of Capital. The Green Bank investment strategy is structured to support lenders and communities to build long-term capacity to fund new energy projects using two types of capital:

1. **Investment Capital:** The Green Bank will provide up to \$450 million of capital (through capitalization awards) to Community Lenders located throughout the target geographies. The Lenders will typically be participating US Treasury CDFIs, US EDA Revolving Loan Funds, USDA Intermediary Relending Funds, and other public and non-profit lenders. Community Lenders will be authorized to invest in Eligible Projects and Eligible Communities as defined in sections C and D below.
2. **Technical Assistance Funds:** As part of a capitalization award, the Community Lenders will receive Technical Assistance funds equal to 10% of their Capitalization Award. These funds can be used by the Community Lenders for Technical Assistance as defined in this RFP.

C. Eligible Projects

This section provides guidelines on the types of projects, communities, and financial products eligible for funding.

1. **Eligible Projects:** Community Lenders must deploy 100% of their Capitalization Awards to finance and/or support eligible projects, activities (businesses), and technologies in one of the following priority project categories.
 - a. **High Performance Buildings:**
 - i. Eligible for financing are projects, activities, and technologies that:
 1. Retrofit an existing building, making a substantial contribution to that building being a net-zero emission building, and/or
 2. Construct a new net-zero emissions building.
 - ii. Built environment includes:
 1. Residential – single or multi-family; for rent or ownership; manufactured housing.
 2. Commercial, industrial, or community facilities
 - iii. Examples of projects in this category include (but are not limited to):
 1. Reducing carbon emissions/energy use through energy and water efficiency, geothermal heating and cooling, and appliance electrification.

2. Whole building retrofits to improve energy efficiency.
3. Adaptive reuse of existing buildings incorporating energy efficiency features including installation of energy efficient windows, door, HVAC systems, and all-electric ENERGY STAR appliances.

b. Distributed Energy Generation and Storage:

- i. Eligible for financing are projects, activities, and technologies that develop and deploy renewable power generation, such as solar, wind, hydro, and geothermal. Storage projects are also eligible.
- ii. Examples include (but are not limited to):
 1. Building/Residential rooftop solar
 2. Building/Residential rooftop solar-plus-storage
 3. Community solar or wind
 4. Stand-alone energy storage
 5. Replacement of diesel generators with battery storage
 6. Energy generation and/or storage systems that support microgrids
 7. Distribution system upgrades necessary for project interconnection

c. Zero Emission Transportation:

- i. Eligible for financing are projects, activities, and technologies that increase the accessibility and use of zero-emission vehicles and supporting infrastructure.
- i. Examples of the types of projects in this category include (but are not limited to):
 1. Fleet electrification, such as school buses, and delivery fleets;
 2. Electric trucks and rolling equipment to support commercial and municipal activity;
 3. Public transportation, such as buses or community transportation;
 4. Charging stations and infrastructure for all EVs.

- d. Business Financing:** Energy efficient / renewable energy products and services supporting the above. Note: additional information on these types of financing is forthcoming from EPA.

D. Eligible Communities/Geographies

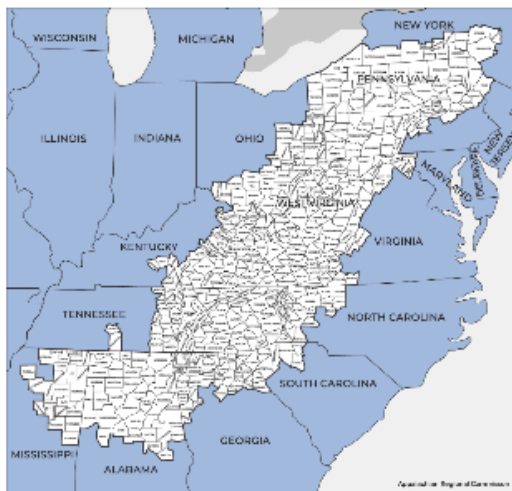
Community Lenders must deploy 100% of funds in geographies that meet both EPA and Green Bank requirements. Please see the Green Bank for Rural America [‘About Us’](#) or our [mapping site](#) for additional information.

1.EPA Requirements: Community Lenders must deploy 100% of their Capitalization and TA Grants to finance and/or support projects in EPA-defined Low-Income and Disadvantaged Communities (LIDAC).

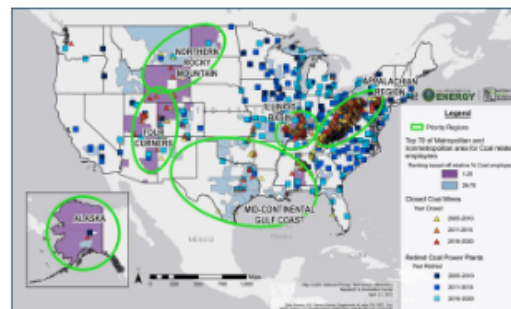
2.Green Bank for Rural America Requirements and Portfolio Priorities: Community Lenders must deploy 100% of their Capitalization and TA Grants to finance and/or support projects in 1) Appalachia or 2) rural communities. The Green Bank also prioritizes investments in Appalachia, Energy Communities, rural communities of color, Native communities, and rural Persistent Poverty Counties.

Appalachia as defined by the Appalachian Regional Commission: [Appalachian Counties Served by ARC - Appalachian Regional Commission](#)

Priority Energy Communities as outlined by the Interagency Working Group on Energy Communities



Appalachia (Appalachian Regional Commission)



Coal Communities and Power Plant Closures (White House Interagency Working Group)

F. RFP Response Requirements

TA Providers interested in providing services should complete the following sections of the RFP Response.

1. **Respondent Information:** Respondents provide key details regarding name of firm, location(s), type of entity and contact details.
2. **Executive Summary:** Respondents are asked to provide a summary of their application.
3. **Organizational Profile:** Respondents provide a short overview of their organization, including mission, entity type, and location and regional focus.
4. **Technical Assistance (TA) Experience:** Respondents should provide a narrative overview of the organization's expertise and experience. Respondents should highlight their experience with the eligible project types and eligible geographies. It is not required that Respondents have expertise in all of the eligible categories. *Specialty expertise is encouraged.*
5. **Key Areas of Expertise and Experience:** Respondents should complete the relevant schedules in Section 5 regarding expertise and experience in the relevant subject matter areas.
6. **Declarations and Certifications:** Respondents must affirm the accuracy of the information provided and intent to comply with relevant regulations and policies.
7. **Completed RFP Response Form:** The application must be filled out in its entirety.
8. **Supporting Documents:** In addition to the RFP Response Form, respondents must provide the following documents in addition to filling out the application.

Required Attachments:

- Organizational Chart, Staffing Chart
- Resumes of Key Individuals

Optional Attachments:

- List of prior consulting projects relevant to the RFP
- Collateral material including case studies, webinars, articles etc
- Current and past clients and projects

G. Solicitation Guidelines

Key Dates - The release date for this RFP is December 4, 2024. This is an Open RFP and there is no deadline for submissions. The Green Bank will target, but not guarantee, a response to proposals within 4 weeks of receiving a complete submission.

Questions and Inquiries - The Green Bank will respond to questions and inquiries electronically or via video meeting. There is a link on our website for asking written questions and a link to schedule a meeting. All communication about this RFP should be through our Help Desk. Access our Help Desk through the [TA RFP page on our website](#).

RFP Responses - Proposing firms are required to respond to this RFP through the Green Bank website at <https://greenbankforruralamerica.org/request-for-proposal/>. Respondents must use the TA RFP Proposal Form

which can be downloaded with the RFP [on the page](#). Supplemental material as defined in the RFP is also allowed. All material must be submitted electronically via the web site.

Notification of Acceptance or Non-Acceptance of Proposal - Respondents will be notified of their acceptance or non-acceptance as a Qualified TA Provider after a complete submission has been reviewed. The Green Bank is targeting a four week review period but that may be subject to change based upon the number of submissions received.

Opportunity to Enter Into a Master Service Agreement - Once accepted as a Qualified TA Provider the Respondent will have the option of entering into a Master Service Agreement (“MSA”) with the Green Bank which will streamline procurement for all parties. The MSA will define all contractual requirements for providing services to Community Lenders, their borrowers and local partners. Once chosen by a Community Lender to provide services, the Scope of Work will be negotiated and managed between the TA Provider and the Community Lender. Please note there it is not a requirement that a Qualified TA Provider enter into an MSA. Additional information regarding the option to enter into a MSA will be provided upon acceptance as a Qualified TA Provider.

H. Selection Criteria

All submissions will be reviewed for completeness and responsiveness to requirements of this solicitation. Submissions deemed incomplete or that do not meet the requirements of the solicitation may be deemed non-responsive, will not be reviewed further and will be returned for resubmission.

All responsive submissions will be evaluated and awarded based on consideration of the following criteria:

1. The firm’s qualifications, technical competence, and experience relative to the subject matter areas defined in Section 5 of the Application.
2. Experience providing these services in communities targeted by the Green Bank (rural communities, Appalachia, energy communities, low income communities, and communities of color).
2. Professional and educational experience of key personnel to be assigned to the project. Resumes of each individual who would be or could potentially be assigned work under a contract award resulting from this solicitation.
3. References - The firm’s experience with organizations conducting activities similar to those of the Green Bank and the firm’s ability to work with federal, state, and local government agencies.
4. Fee schedules and expected cost for services.
5. The extent of M/WBE participation in performing the work will be considered as additional selection factors.