



Request for Proposal

IT Services

Green Bank for Rural America
Christiansburg, Virginia

SUMMARY: [Green Bank for Rural America](#) (“Green Bank”), a subsidiary of [Appalachian Community Capital](#), is requesting proposals from qualified IT services partner to be a critical part of both organizations’ growing infrastructure. Starting with a \$500 million award from the EPA, Green Bank is commencing operations and expecting to grow in the coming years into a robust, national provider of climate financing solutions and technical assistance support for rural America. A description of our organizations, services needed, and other pertinent proposal information follows.

RFP Contact:

Aleks Whitchurch

Finance and Operations Manager, Green Bank for Rural America

awhitchurch@acc1.org

RFP SUBMISSION INSTRUCTIONS:

Email the entire proposal as a single-document attachment in either Word, PowerPoint, or PDF format by February 14, 2025 at 11:59 PM Eastern Time to finance_ccia@acc1.org (finance’underscore’ccia@acc1.org). The proposal must be written in English and submitted by email. For questions regarding this request for proposals, please send an email to Aleks Whitchurch at awhitchurch@acc1.org.

REQUEST FOR PROPOSALS SCHEDULE:

Release of Request for Proposals	01/15/2025
Submission of Proposals (date and time)	February 14, 2025, 11:59PM
Announcement of Selections	February 28, 2025
Anticipated Contract Start Date	March 14, 2025

THE ORGANIZATIONS

The [Green Bank for Rural America](#) (Green Bank) is a wholly-owned, national, non-profit subsidiary of [Appalachian Community Capital](#) (ACC), a Community Development Financial Institution (CDFI) serving member CDFIs across Appalachia founded in 2013. Both ACC and Green Bank are incorporated in the Commonwealth of Virginia and operate largely remotely.

Green Bank commenced operations in late 2024 with a \$500 million award from the EPA

Greenhouse Gas Reduction Fund (“GGRF”) competition. Green Bank’s primary activities will be to provide capital and technical assistance to community lenders to finance new energy projects in rural communities across the United States.

Both ACC and GBRA are rapidly growing their teams to include the expertise needed to manage the EPA award, procure additional funding dollars in support of their missions, and meet their program objectives. The entire team across both organizations is expected to reach somewhere between 20 and 25 full time employees across the United States, along with contractors and vendors providing specialized services, by the end of 2025.

SCOPE OF WORK / REQUESTED SERVICES

The IT services organization will be responsible for the following services:

Hardware / Device Management

Key Note: In order to attract high-quality and diverse talent, GBRA and ACC are hiring for primarily remote work across the United States, although a small hub office may eventually be established. Multi-state, remote work organizational experience is a must.

- Develop and manage a robust list of technological devices and office supplies (including but not limited to laptops, keyboards, mobile phones, monitors, microphones, etc) to help enable the team’s work and communication.
- Procure and provision devices for new and existing employees – with a particular focus on Day 1 security and work-readiness.
- Set and safeguard own-device policies for contractors, vendors, and employee devices not provided by ACC/GBRA.
- Track device security and functionality and provide a system for managing device reclamation upon employee termination.
- Develop a proactive program for regular device updates, swap-ins, and upgrades to ensure team productivity and compatibility with new systems and technologies.

Software / Platform Management and Innovation

Key Note: In order to remain consistent with the vast majority of its partner organizations, peers, and clients, GBRA and ACC have declared themselves Microsoft organizations. Deep expertise in the Microsoft suite of products is expected.

- Develop an organization-wide approach to securely utilizing the Microsoft suite of products including but not limited to One Drive, SharePoint, Teams, Word, Excel, PowerPoint, etc.
- Manage a structured approach (ideally with single sign-on capabilities) to additional

team software (outside of the Microsoft suite) necessary for effective work and management. Such software may include but is not limited to project management software such as Monday or Asana, organizational software such as Smartsheet, communication platforms such as Zoom, and email marketing/communication platforms.

- Enable and manage software accessibility as well as usage policies for all company-wide software. This will include establishing and managing roles and security clearances for both employees and vendors/contractors.
- Provide robust usage and best-practice training, troubleshooting, and general support across software types for the highest level of effectiveness for all team
- Provide strategic expertise and partnership for assessing and procuring additional software/platforms as new needs arise.
- Provide strategic expertise and partnership to assess, procure, embed, and enable AI-driven technologies; develop robust security protocols to ensure these technologies and the data they access are safeguarded appropriately.

Website/Email/Domain Management

Key Note: While the content and design of the ACC and GBRA websites may be separately outsourced and managed and is not in scope for this RFP, management of the underlying platform technology is.

- Own, update, and manage the ACC and GBRA domains and hosting platforms to ensure seamless website and email functionality, best-in-class security, and leading-edge accessibility practices.
- Troubleshoot email deliverability issues and maintain regular, proactive email hygiene for the organization.
- Regularly review and assess technological needs and improvements across all external facing communications mediums including but not limited to: websites, emails, microsites, etc.
- Manage processes for sharing and/or utilizing domains securely as necessary.

CyberSecurity

Key Note: ACC and GBRA regularly manage government grants and interact with government entities; the highest level of security focus is therefore critical; financial services experience and government entity experience are required.

- Develop and manage a robust program of cybersecurity training, testing, risk mitigation, and issue management to ensure a security-minded approach to data and

communication.

- Provide strategic leadership for appropriate security protocols and certification.
- Manage data sharing, document retention, privacy compliance, and other technology-related security measures.
- Manage vendor/contractor access protocols and tracking.
- Partner with the Finance team to inform the procurement of appropriate Cybersecurity Insurance.

It is anticipated all of the above services will commence in Q2 2025, if not sooner.

BUDGET

- We plan to issue one award to one organization, and we are open to different billing structures, including fixed price, cost reimbursement (with profit margin negotiated), and time and materials.
- If cost reimbursement or time and materials methodology is chosen, please provide a detailed build-up of your proposed cost.
- Budget will be subject to terms and conditions negotiated with EPA.

PROPOSAL MATERIALS

Responses should include:

- **Executive Summary:** In no more than two pages, summarize your proposal and explain why your firm is best suited to assist ACC and the Green Bank.
- **Firm Profile:** Briefly describe your firm's size, structure and resources as applicable to the financial services, nonprofit, and government contracting/Federal grant managing organizations. An affirmative statement should be included indicating that the firm and all assigned key professional staff can work across various state jurisdictions domestically.
- **Services Approach:**
 - ◆ Describe your services provided and how those align or miss any of the requested services as outlined in this RFP.
 - ◆ For those services that you do not provide, please provide an explanation of your recommendation for and approach to interacting with outside organizations that do provide these services.
 - ◆ Provide information on whether you provide services to any similar types of organizations or groups.
 - ◆ Describe your firm's philosophy in serving clients, including your commitment

- regarding the team's accessibility to management and support staff.
- ◆ Describe how your firm's senior executives will be involved in the engagement and address escalation procedures.
- ◆ Describe your firm's familiarity with and readiness for Information Systems audits.
- **Diversity commitment:** Briefly outline your firm's commitment to diversity and inclusion, such as training, supplier diversity programs, pro-bono and/or charitable contribution commitments.
- **References:** Provide a list (minimum of two), including the names and contact information, of clients who may be contacted for reference. This list should include nonprofit and government contracting/Federal grant clients.
- **Fee Commitment:**
 - ◆ Provide a fee proposal for the services included.
 - ◆ Provide a detailed and transparent pricing model for any additional projects or services not included in the proposed scope of work.
 - ◆ Furnish billing rates and hours for each class of professional personnel as needed.
 - ◆ Indicate the locations of office(s) that will be providing services. Describe your approach to billing for expenses, as well as phone calls and routine matters. Please also provide a categorical summary of any out-of-pocket expenses, as well as any other indirect or administrative expenses, you intend to charge in conjunction with the overall relationship.
 - ◆ Identify the extent to which your services shall rely on the work of other consultants, outlining these third-party deliverables and timelines necessary to support your proposal.
 - ◆ Green Bank will not be responsible for expenses incurred in preparing the proposal. Such costs should not be included in the proposal.
 - ◆ Identify the firm's insurer for professional liability with the policy limits of such coverage and expiration date. The successful firm will be required to provide evidence of such insurance as part of its contract with Green Bank.
- **Disclosure and Certifications:**
 - Indicate whether you are presently engaged or plan to be engaged with any other recipient of Greenhouse Gas Reduction Fund dollars;
 - Conflicts of Interest Statement (see below section on Conflicts of Interest);
 - Lobbying Certification (see below section on Byrd Anti-Lobbying Amendment);
 - Partner Demographics.

SELECTION CRITERIA

Criteria	Max Points
<p>MANDATORY CRITERIA: Proposals will not be considered for evaluation without meeting all of the following mandatory criteria:</p> <ul style="list-style-type: none"> A. Licensed IT Services / CyberSecurity organization. B. Independent. C. No record of substandard work. 	10
<p>TECHNICAL CRITERIA: Those proposers who have met each of the criteria above will be evaluated on the following criteria:</p> <ul style="list-style-type: none"> A. Responsiveness and timeliness of the proposal in clearly articulating an understanding of the work to be performed. <ul style="list-style-type: none"> 1. The proposer’s understanding and comprehensiveness of response to the RFP regarding each element of work to be performed/scope of work. 2. The proposal follows the specified format, and includes all certifications 3. The work can be completed within the required project timeline with realistic estimates for each audit step. B. Firm's technical experience. <ul style="list-style-type: none"> 1. Satisfactory results of reference checks and related materials. 2. The proposer has prior experience working with similar organizations. C. Qualifications of proposed staff. <ul style="list-style-type: none"> 1. Qualifications of engagement and supervisory personnel to be assigned to Green Bank. 2. Quality of interviews with senior engagement personnel to be assigned to Green Bank. 3. Experience with managing the security of programs funded by the Federal government. D. Firm's quality control program. <ul style="list-style-type: none"> 1. Internal quality control program for governmental audits and compliance with EPA program guidelines. 2. Clear plans for timely issue identification, management, and mitigation, and communication. E. Firm’s commitment to diversity and inclusion. <ul style="list-style-type: none"> 1. Evidence of firm or individual commitment diversity and inclusion as evidenced by staffing, training, DBE/MBE status, pro bono and/or contributions. 2. Evidence of a culture of respect and inclusion internally and in client relationships. 	60
<p>COST CRITERIA: Reasonableness of proposed cost (considering hourly billing rates, number of hours, out-of-pocket expenses, and total proposed cost).</p> <ul style="list-style-type: none"> A. The proposal includes a detailed budget for each type of services in the scope of work. B. The proposed costs are reasonable. C. Contract terms and conditions are acceptable. 	30
Total Points (max)	100

[ATTACHMENTS FOLLOW]

**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 Green Bank.

BUY USA - DOMESTIC PREFERENCE FOR PROCUREMENTS

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 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)

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 firm 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

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.) 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. 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)

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 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.

COPYRIGHT AND DATA RIGHTS (IF APPLICABLE)

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, Contractor will identify such data and grant to the contracting entity or acquires 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)

Contractor and any sub-contractor 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 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).

(1) 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).

(2) Telecommunications or video surveillance services provided by such entities or using such equipment.

(3) 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.

PUBLICATIONS CLAUSE (FOR INFLATION REDUCTION ACT “IRA” FUNDS)

Any publications produced with funds from this award must display the following language: “This project [is being] [was] supported, in whole or in part, by federal award number [enter project FAIN] awarded to [name of Recipient] by the U.S. Department of the Treasury.” This requirement is subject to change based on the requirements of EPA.

RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT (IF APPLICABLE)

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, "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

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, 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. 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.

AUDITS

The sub-recipient must submit the audit to the recipient within 9 months of the end of the recipient's fiscal year or 30 days after receiving the report from an independent auditor, whichever is earlier. As provided in 2 CFR 200.337(a) the recipient must provide EPA, the EPA Office of Inspector General, and the Comptroller General with access to the subrecipient's independent auditor reports.

[Signature Page Follows]

ACKNOWLEDGMENT AND CERTIFICATION:

On behalf of [NAME OF FIRM], 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 Firm:

Name of Individual:

Title:

Signature: _____

Date:

SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION

- a) Promptly notify Green Bank in writing of any legal proceedings resulting from any subcontract or other commitment related to the terminated portion of the contract;
- b) Settle outstanding liabilities and proposals arising out of the termination; and
- c) 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