

Request for Proposals
NASEO Senior Advisor for Energy Financing

Solicitation Number: NASEO-2024-RFP-004

Released: December 3, 2024
Responses Due: December 30, 2024

National Association of State Energy Officials
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I. Introduction and Background

Energy financing is a critical tool states can use to support energy investments and grow the energy economy. Financing enables states to leverage public dollars to attract private capital to invest in energy projects by filling in investment gaps or ensuring that investing in innovative energy solutions is less risky for private capital. Properly-developed state-level financing programs can drive billions of dollars in clean energy investments, supporting the development of good jobs and additional economic activity in various sectors of a state's energy economy, as well as assisting with meeting state-mandated climate goals.

The National Association of State Energy Officials (NASEO) works to support State Energy Offices as they develop and operate energy financing programs through its Financing Committee and associated activities. NASEO facilitates state collaboration and peer learning amongst its members on key energy efficiency, renewable energy, and energy infrastructure financing mechanisms and tools at the state and local levels, such as Energy Savings Performance Contracting (ESPC); State Energy Revolving Loan Funds; loan loss reserves and other credit enhancement mechanisms; on-bill financing and on-bill repayment; Green Banks and other co-investment organizations; and Commercial Property Assessed Clean Energy (C-PACE). NASEO's members work together to identify market barriers, engage private sector and program partners, and share solutions for effective and innovative programs.

NASEO seeks a *Senior Advisor* to work with NASEO to provide expertise and support to help execute NASEO's energy financing projects and deliverables. The *Senior Advisor* will be expected to have knowledge of the programmatic, policy, and technical aspects of state, local, and Federal financing programs and initiatives as well as state-level goals and activity. The *Senior Advisor* should also be prepared to provide substantive feedback and guidance on NASEO deliverables throughout the deliverable development process. Finally, the *Senior Advisor* should have a deep understanding of State Energy Offices' roles, distinct from state regulatory roles, in energy finance programs and policy across the country.

II. Objectives

The overall objective of the *Senior Advisor* is to work with NASEO and support and develop NASEO deliverables underneath U.S. DOE contracts, as well as provide guidance and offer direction for future development of NASEO's financing program activities.

III. Statement of Work, Timeline, and Expected Deliverables

It is envisioned that this contract will be initiated on February 1, 2025, and concluded on December 31, 2025. NASEO will host a kick-off meeting with the *Senior Advisor* to discuss the scope of work in further detail once a selection has been made. The *Senior Advisor* will be responsible for the following deliverables and support:

Assisting with NASEO's Financing Committee

The *Senior Advisor* will provide support for NASEO's work on peer-to-peer learning among states on various energy financing topics. The *Senior Advisor* will help provide direction on program resources, work products, meetings, and webinars in an advisory capacity, and to proactively offer ideas for financing topics the larger Financing Committee can explore. On a case-by-case basis, and especially for high-priority items, NASEO will develop web content or other educational resources (such as written briefings, resolutions, or memos) for dissemination to NASEO's membership and share updates with DOE; the *Senior Advisor* may review resources for accuracy and content.

Supporting the Development of Energy Efficiency Revolving Loan Funds

The *Senior Advisor* will assist NASEO in an advisory capacity in its work to support State Energy Offices with identifying and implementing foundational steps that can help position their states and communities to support the development energy efficiency revolving loan funds, including maximizing braiding DOE funds with other federal programs. Support may include, but is not limited to:

- Create resources at the request of NASEO and the states;
- Identify successful state RLF programs and assist with review of NASEO-developed case studies on these programs;
- Assist with development and review of meeting agendas focused on RLF development and complementary lending strategies;

Complementing Existing Energy Programs with New Incentives

The Senior Advisor will assist NASEO as it works to help State and Territory Energy Offices better identify, pursue, leverage, and implement financing opportunities. Support may include, but is not limited to:

- Create resources at the request of NASEO and the states;
- Review and provide guidance on NASEO-developed tax incentive-related resources to support State Energy Offices, such as a summary of tax incentives; a summary of how tax incentives may impact policy/program design; case studies of how State Energy Offices are engaging on tax incentives within their state; and/or recommended strategies that leverage and integrate tax incentives with public and private financing (e.g., CPACE, green banks).
- Assist NASEO in helping states understand the mechanics of energy tax credits and incentives, including: exploring how tax incentives may impact State Energy Program (SEP)-supported state-level policy and program design and examining how tax incentives can be leveraged and paired with other DOE funding to support a state's energy goals.

Improving Energy Performance in Public and Institutional Facilities

The *Senior Advisor* will support NASEO's work on educating State Energy Offices on the latest in ESPC and related models. Support may include, but is not limited to:

- Create resources at the request of NASEO and the states;
- Review and provide guidance on NASEO-led deliverables, including a NASEO Program-in-a-Box on ESPC for school districts and case studies on ESPC-Energy-as-a-Service hybrid approaches; and
- Identify opportunities for promotion of DOE's PCNRC trainings for State Energy Offices.

Positioning States to Support Clean Energy Fund Development and Leverage Federal Funds

The *Senior Advisor* will assist NASEO in an advisory capacity in its work to support State Energy Offices with identifying and implementing foundational steps that can help position their states and communities to support the development of clean energy funds and green banks, including maximizing braiding DOE funds with other federal programs. Assistance can include, but is not limited to:

- Create resources at the request of NASEO and the states;

- Attend small-group and one-on-one discussions alongside NASEO and with State Energy Offices to deep-dive on key issues, including the integration of WAP and LIHEAP considerations; foundational steps to support the establishment of a state or local green bank, including integration with DOE-funded financing programs; workforce impacts and needs; and promising strategies for State Energy Office-State Green Bank coordination and collaboration, among others.
- Offer advice alongside NASEO to states on developing project and program ideas for support by green banks and clean energy funds.
- Provide reviews of summary reports and a NASEO Program-in-a-Box highlighting innovative program and project models that states will advance through green banks and clean energy funds.

IV. Period of Performance

This project is estimated to last from February 1, 2025, to December 31, 2025.

Compensation

The *Senior Advisor* shall invoice NASEO monthly for actual work completed. NASEO shall reimburse the *Senior Advisor* for hours spent in the execution of the work (not to exceed the total approved task budget shown in the final contract agreement) once NASEO has received payment from DOE. The *Senior Advisor* will submit a monthly invoice by the tenth of each month of the agreement.

Rejection of Proposals and Incurred Costs

This Request for Proposals (RFP) does not obligate NASEO to award an agreement. All costs incurred in response to this RFP are the responsibility of the respondent.

NASEO reserves the right to reject any or all submitted proposals not in conformance with this RFP or for other causes. NASEO reserves the right to request new proposals or to cancel all or part of this solicitation.

VI. Contract Requirements

The funds for this work have been provided through cooperative agreements between NASEO and DOE's Office of State and Community Energy Programs. The underlying terms and conditions of the cooperative agreement between DOE and NASEO will be provided to the *Senior Advisor* and incorporated in the awarded subcontract. All requirements of the DOE contract shall be controlling, including, but not limited to, federal reporting and the propriety and form of expenses and costs. The contract shall be issued following approval from DOE and will become effective when signed and dated by NASEO and the *Senior Advisor*.

VII. Responding to the RFP

Please submit responses to the RFP to Sam Cramer by e-mail at scramer@naseo.org. **RFP responses are due no later than December 30, 2024.** Any questions on the RFP should be directed to Sam Cramer by e-mail at scramer@naseo.org no later than December 13, 2024. All questions received and answers will be posted to the NASEO RFP website.

Responses shall include and fully address the following:

- Cover letter
 - Assurance that applicant is not a debarred or suspended entity

- Hourly billing rate and assurance all customers are quoted the same billing rate
- Resume (please identify any foreign nationals included in the proposal)
- Description of relevant experience including prior work on state and local energy financing as well as working with relevant state agencies (in particular with State Energy Offices)

Please limit the cover letter and the description of relevant experience to **2 pages in 11-point font**. Resumes do not count toward the page limit.

Note: Late proposals will not be accepted.

VIII. Consultant Selection and Required Qualifications

NASEO will select a *Senior Advisor* through a competitive selection, which will include consideration of the following:

- Experience working with State and Territory Energy Offices or other relevant state agencies.
- Relevant experience working on energy financing policy and programs at the state and local level;
- Quality of academic and professional experience in relevant field; and
- Flexibility of availability.

The NASEO Evaluation Team will use the following criteria in assessing all responses to this RFP:

Technical Experience and Applicant Qualifications (90 percent of total score)

- Relevant experience in proposed topics in the energy sector, particularly working with State Energy Offices and other state agencies.
- Adequate level of technical knowledge to meet the demands of the project.
- Quality of academic and professional experience in relevant field.

Program and Policy Factors (10 percent of total score)

- Direct experience in working with State Energy Offices
- Direct experience in working with other financing entities including the U.S. Department of Energy