

**ADDENDUM TO
REQUEST FOR PROPOSALS**

SOLAR FOR ALL PROGRAM FINANCE SUPPORT AND MODELING SERVICES

POSTED DATE: May 12, 2025

ADDENDUM NO. 01

Proposal Due Date: Friday June 6, 2025, at 11:59 PM ET

To All Potential Respondents:

The purpose of this Request for Proposals (the **RFP**) is to solicit proposals from qualified and experienced vendors for an array of activities related to Program finance. Firms on this list of prequalified entities will be eligible to respond to work orders issued by Inclusive Prosperity Capital, Inc. (**IPC**) and Sustainable Underwriting for Resilience & Efficiency, LLC (**SURE**) for services requested under this RFP.

This addendum to the RFP (this **Addendum**) modifies the RFP only to the extent indicated herein. Except as specifically set forth in this Addendum, all other terms set forth in the RFP remain unchanged and in full force and effect. This Addendum is hereby incorporated into and made an integral part of the RFP, and Respondents shall incorporate this Addendum into the Proposals as if it were issued in the original RFP. Per the RFP, Respondents must acknowledge receipt of any and all Addenda, listing each Addendum by number (s) and date (s) in their proposals on Form 3: Acknowledgement of Addenda. All capitalized terms used herein without definition shall have the meanings given to them in the RFP.

Questions and Answers:

1. For the purpose of the Proposal deadline, can you confirm that the deadlines are as of 11:59 AM or PM ET?
 - The RFP deadlines are as of 11:59 PM ET.
2. Can a vendor provide a response to both this RFP as well as the Impact Reporting and Household RFP? Similarly, would the winning proposer for this RFP be conflicted for any work provided in the Impact Reporting and Household RFP (and vice versa)?
 - Yes, a vendor may submit a response to both this RFP and the Impact Reporting and Household RFP, provided they meet the qualifications and requirements outlined in each solicitation.
 - Regarding potential conflicts of interest: awardees of either RFP are not automatically disqualified from receiving an award under the other. Final determinations related to conflicts will be made during the evaluation and negotiation phase and may include additional conflict mitigation requirements or limitations on certain tasks, as needed to maintain the integrity and objectivity of program reporting and implementation.
3. Does IPC have a definition or defined guidelines for how it calculates affordability? If so, could IPC share its approach?
 - Information about IPC's Solar for All program can be found through IPC's [Solar for All Resources page](#). Solar for All-supported projects require a 20% minimum household savings net of costs incurred by the LIDAC household over the period of performance. The Community Power Coalition's Household Savings Methodology [can be found here](#). Project eligibility, evaluation criteria for financing applications, and the definition of "properties providing affordable housing" can be found in

[IPC's Financing Products Program Guidance](#) on page 6-7, on pages 24-25, and on page 33, respectively.

4. Are there any page limits/ requirements associated with the respective sections? Any page limitations on overall proposal submittal?
 - There are no page limits or formatting requirements associated with the respective sections or the overall proposal submission. Respondents are encouraged to be clear, concise, and focused in their proposals to ensure efficient and effective evaluation by the review team.
5. Other than multifamily housing solar project models (MFH), and Resident-Owned Communities (ROC) model, what other various ownership structures is IPC envisioning that it needs support on?
 - We anticipate projects that utilize a variety of ownership models and structures, though it is difficult to give a complete list. As examples, you may look at People's Solar Energy Fund's projects, which use a variety of ownership structures, including cooperatives. Broadly, we seek to innovate models that build community wealth and produce community benefits.
6. Could IPC confirm that "technical assistance" is in reference to technical commercial and financial issues and does not intend to include engineering advice?
 - No. While engineering training may be instructive, engineering services are not being sought under this RFP. The Scope of Work/Services for the Program Finance Support and Modeling Services RFP outlines the technical services being sought.
7. Could IPC confirm that IPC / CPC lenders will make final decisions on loan approvals?
 - Yes, IPC and other CPC lenders will evaluate and make determinations on Financial Assistance applications under this program. However, to the extent there are co-investment opportunities with other community lenders, those lenders will handle their own loan approvals.
8. Would IPC be able to provide additional information on how they intend to evaluate respondent's Commitment to Community Engagement and Equitable and Meaningful Impact as well as how they would like respondents to demonstrate such commitment through the proposal?
 - IPC will evaluate Commitment to Community Engagement and Equitable and Meaningful Impact based on a variety of factors, including track record of working with low-income and disadvantaged communities. Examples to demonstrate this could include past projects or programs in these communities, the dollar amount of projects supported in these communities, experience working with and engaging low-income and disadvantaged communities or engaging through partnerships or community-based organizations. The Evaluation Criteria for Financing Applications outlined in Section 5 of IPC's [Financing Products Program Guidance](#) (see page 24-25) may be instructive.
9. Please provide examples household savings beyond utility savings.
 - [U.S. Department of Housing and Urban Development's memorandum on the Treatment of Solar Benefits in Master-metered Building](#) (May 2023) outlines various benefits beyond utility savings including: job training and workforce development, additional staff serving residents, facility upgrades, free or reduced internet service, financial literacy programs, wellness programs, shuttle services, community events, increased operating or replacement reserves for property, resilience, in-kind donations, and gift cards.
10. Are non-monetary benefits such as comfort included?
 - It is not clear whether non-monetary benefits may be assessed as part of household savings under Solar for All. We are awaiting further guidance from the U.S. Environmental Protection Agency about whether and how non-monetary benefits may be assessed.

11. Developing models and tools to assess MFH solar project cost-effectiveness and savings; Would the use of existing solar models and tools be allowed?
 - Yes, if they can be adapted to incorporate the specific requirements of the IPC's Solar for All program.
12. Providing inputs into training and curriculum for MFH owners and developers on Program requirements and MFH models, tools, instruments, and deal structures; Can you clarify what you mean by "inputs"? Would this be a reviewer role, or instead developing materials?
 - It could be a reviewer role, but more typically it would be materials development, though it might not always be in the final polished form that is delivered.
13. Advising on how to structure and advance ROC solar deals under the Program, including consulting on capital stack support for a variety of ownership models, Program financing requirements, research into and incorporation of target market community solar policy factors, and the delivery and verification of minimum household savings (including non-utility benefits) to ROC households; Please provide examples household savings beyond utility savings.
 - [U.S. Department of Housing and Urban Development's memorandum on the Treatment of Solar Benefits in Master-metered Building](#) (May 2023) outlines various benefits beyond utility savings including job training and workforce development, additional staff serving residents, facility upgrades, free or reduced internet service, financial literacy programs, wellness programs, shuttle services, community events, increased operating or replacement reserves for property, resilience, in-kind donations, and gift cards.
14. Are non-monetary benefits such as comfort included?
 - It is not clear whether non-monetary benefits may be assessed as part of household savings under Solar for All. We are awaiting further guidance from the U.S. Environmental Protection Agency about whether and how non-monetary benefits may be assessed.
15. Developing models and tools to assess ROC solar project cost-effectiveness and savings; Would the use of existing solar models and tools be allowed?
 - Yes, if they can be adapted to incorporate the specific requirements of IPC's Solar for All program.
16. Performing work related to developing and/or utilizing financial tools and analysis to determine cost-effectiveness, energy savings, and financial sustainability that underpins the prioritization of projects and mitigates financial risk with appropriate financial returns and impact per Program dollars deployed; Would metrics and targets of cost effectiveness be provided?
 - Yes, some cost-effectiveness metrics and targets may be provided; however, others will need to be investigated, developed, and vetted before they are applied.
17. Identifying and integrating consideration of state and local incentives, tax credits, or other pricing models that may help to reduce overall capital cost for implementation; How much depth and accuracy are expected? Would a reference to existing incentive platform(s) be sufficient? Or should we provide and maintain a list per state/utility/state energy office?
 - In general, simply referencing existing incentive platforms will be insufficient. We are looking for robust modeling that can be tailored on a project-by-project basis for underwriting purposes where at minimum *inputs* to the modeling are the relevant state/local incentives and tax credits; however, any solutions for accessing up to date information would be of interest – both to speed underwriting and to help tailor outreach efforts. Solar for All-supported projects require a 20% minimum household

savings net of costs incurred by the LIDAC household over the period of performance. The Community Power Coalition's Household Savings Methodology [can be found here](#).

18. Interviews or Presentations: Would the respondent be provided with a list of specific questions or areas that need clarification prior to the interview?
 - Interviews, if conducted, may include a mix of follow-up questions and scenario-based discussions. While we may provide a list of focus areas or topics in advance, we cannot guarantee that specific questions will be shared prior to the interview. Respondents are encouraged to be prepared to discuss their proposal, approach, and capacity in greater detail during the interview process.
19. Is there a preference for having a comprehensive proposal that encompasses all of the activities in the RFP versus a more limited targeted proposal?
 - There is no preference between a comprehensive proposal covering all activities outlined in the RFP and a more limited, targeted proposal. All proposals will be evaluated based on their responsiveness to the scope, qualifications, proposed approach, and overall value, regardless of the breadth of activities addressed.
20. Is there a limit to the number of subcontractors on a team?
 - No. IPC is open to teams of all sizes. Proposals will be assessed on the evaluation criteria and weighting provided in the RFP.
21. Is IPC open to considering other activities to support the Solar for All Program that were not specified in the RFP?
 - No. IPC must adhere to federal procurement standards to obtain goods and services under Solar for All. If activities beyond the Scope of Work/Services are required for our Program, IPC will undertake a procurement process for those additional activities.
22. Can you please share whether Inclusive Prosperity Capital will leverage existing finance programs, market information, and template to create this program?
 - Yes, IPC's Solar for All program will rely on a combination of existing information, data, and templates as well as information, data, and templates developed in the planning and execution of its Solar for All program. All templates and instruments produced in the scope of work/services described in this RFP will be subject to IPC review.
23. Will IPC be leveraging a technology platform for this work? If so, which one?
 - IPC relies on a variety of technology platforms for its work, including the Microsoft Office Suite, Monday.com, Netsuite, Salesforce (including customized workflows), and an Azure data warehouse, but no specific technology platforms are required to respond to this RFP.
24. Does IPC have a pipeline of projects interested in financing?
 - IPC has launched its intake and application process for residential-community solar projects. More information about IPC's initial Solar for All financing products is available on our Solar for All resources page. IPC expects to launch financing products for multifamily projects later in 2025. Other CPC lending organizations will be launching Solar for All financing products later this year.
25. Does IPC have subrecipient/ other structures in place with the partnering organizations?
 - Yes, IPC has executed agreements with the subrecipients within the Community Power Coalition, including Black Owners of Solar Services (B.O.S.S.), Clean Energy Group, Inc., Coalition for Community Solar Access, Community Housing Capital, Inc., GRID Alternatives, Inc., Interstate Renewable Energy Council, NeighborWorks Capital Corporation, People's Solar Energy Fund, Inc.,

ROC USA, LLC, Sustainable Underwriting for Resilience & Efficiency, LLC (SURE), and the University of New Hampshire Carsey School's Center for Impact Finance.

26. Does the "Commitment to community engagement and equitable and meaningful impact" section refer to how the vendor engages community or how the vendor can enable IPC to engage community?

- Commitment to Community Engagement and Equitable and Meaningful Impact focuses on how respondents engage with communities. IPC will evaluate Commitment to Community Engagement and Equitable and Meaningful Impact based on a variety of factors, including track record of working with low-income and disadvantaged communities. Examples to demonstrate this could include past projects or programs in these communities, the dollar amount of projects supported in these communities, experience working with and engaging low-income and disadvantaged communities or engaging through partnerships or community-based organizations. The Evaluation Criteria for Financing Applications outlined in Section 5 of IPC's [Financing Products Program Guidance](#) (see page 24-25) may be instructive.

27. Are standard year-over-year increases in rates, typically part of annual escalation adjustments, allowable?

- Yes, standard year-over-year rate increases that reflect reasonable annual escalation adjustments are allowable. However, any proposed escalation must be clearly stated in the cost proposal, including the basis and percentage of the increase. All proposed rate adjustments will be evaluated for reasonableness and consistency with industry standards and must comply with applicable federal cost principles under 2 CFR 200 Subpart E.

28. Is the contract for a 4-year PoP or 1 base with 3 option years?

- The contract is structured as one base year with three option years, subject to annual review, performance, and continued funding availability. The exercise of option years will be at the sole discretion of the awarding entity.

29. All: Are you able to provide via email or a data room IPC's full EPA-approved workplan or the relevant sections (SURE, ROC)?

- No. The RFP describes the scope of work/service being sought. At this time, we are not able to provide our full workplan or workplan provisions beyond what is offered in the RFP. General information about [our Solar for All program can be found here](#).

30. Scopes 1 and 2: Can you elaborate on the meaning of 'ongoing technical assistance to overcome challenges' in the SURE/MFH and ROC scopes of work? Does this refer to implementation of IPC's tools and financial products?

- There are many implementation challenges to supporting solar projects that deliver a minimum of 20% household savings to LIDAC beneficiaries in the Solar for All program context. This is particularly true for multifamily models which may have limited roof space and complicated financing, metering, and controlling structures. ROC solar ownership models have not been well developed and may present their own set of challenges. These challenges are not specific to IPC and may be relevant to other CPC member organizations. We anticipate the potential need for ongoing assistance as we gain more project experience and market feedback.

31. Scope Item 2C: This scope item states, "Producing templates and legal instruments to facilitate and scale ROC solar deals under the Program." Can you clarify IPC's expectations for "legal instruments" in this context and whether these are to be finished products or drafts that IPC's own attorney will refine and finalize?

- All templates and legal instruments produced will be subject to IPC and CPC review.

32. Scope 3: Would the selected consultant support all components of CPC/IPC's SFA program, or only the Multifamily and Resident-Owned Communities projects?
- Scope of Work/Services 3 will support all project types, including various residential community solar models with multiple ownership structures, in addition to multifamily and resident-owned community projects.
33. In scope item 1g – who is/are the recipient of technical assistance – IPC? Solar developers? Multifamily housing owners/developers?
- Other parties may benefit, but the Scopes of Work/Services outlined in this RFP, including 1.g., are intended to support IPC and CPC member organizations in implementing our Solar for All program.
34. For Section 2: Technical Approach and Scope Alignment, can you offer any guidance on what type of information you are seeking in this section given that there is not a specific order and quantity of the tasks?
- We are seeking proposals that respond to one or more of the scopes of work/services outlined in this RFP. Respondents do not need to submit proposals that respond to all the scopes of work/services. Respondents will be evaluated based on how their proposed approach aligns and addresses the scope(s) of work/services they respond to from a technical perspective.
35. For Section 4: Commitment to Community Engagement and Equitable and Meaningful Impact, can you provide any guidance on what information you are looking for in this response?
- IPC will evaluate Commitment to Community Engagement and Equitable and Meaningful Impact based on a variety of factors, including track record of working with low-income and disadvantaged communities. Examples to demonstrate this could include past projects or programs in these communities, the dollar amount of projects supported in these communities, experience working with and engaging low-income and disadvantaged communities or engaging through partnerships or community-based organizations. The Evaluation Criteria for Financing Applications outlined in Section 5 of IPC's [Financing Products Program Guidance](#) (see page 24-25) may be instructive.
36. Section 5 requires "Required Forms" to be submitted. Is the IPC Doing Business Form included on page 11 the only required form?
- No, in addition to the IPC Doing Business Form, other Required Forms were omitted in error. Addendum No.2 will be issued to provide the other Required Forms. Respondents should review published Addenda before submitting a proposal.
37. Is partnering with other consulting groups something you are looking for in this phase of the RFP process?
- Teaming on a proposal is not required, but it is permissible. Teaming may be beneficial where it allows a Respondent to more fully address one or more of the scopes of work/services outlined in the RFP.
38. Are there any particular states or regions that are being prioritized for funding?
- IPC's Solar for All program covers AK, AL, AZ, CA, CO, CT, DE, FL, GA, HI, IA, ID, IL, IN, KS, LA, MA, MD, ME, MI, MN, MO, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, Puerto Rico, and the District of Columbia. The program's coverage is also displayed on [IPC's About Solar for All page](#). In evaluating projects for financial assistance, IPC considers geography. Geographic considerations include coverage of emerging solar markets and the relative geographic saturation of projects or concentrations within financing product type or project type.
39. How are you anticipating this program interacting with state-level solar for all programs and the technical assistance offered by these programs?

- Other Solar for All programs have different geographic scopes, product types, workplan approaches, and launch timelines. . Given the different focus among Solar for All awardees, a project ineligible for IPC's Solar for All financial assistance or technical assistance may be eligible for support from a different awardee's Solar for All program or vice versa.

Programmatically, there may be opportunities for solar developers to leverage IPC's Solar for All technical or financial assistance while receiving support from other Solar for All awardees, but outputs and outcomes may not be double-counted. Solar for All supported projects may leverage other federal or local sources of funding, including solar investment tax credits, SRECs, LIHEAP, USDA, and similar funding, as well as private sources of capital. IPC's Solar for All program will avoid issuing financial assistance to projects that could be financed through other sources of funding.

IPC is in continual dialogue with other state and nonprofit Solar for All awardees and will actively seek to share best practices. Some of this may be facilitated by NREL, CESA, or the NCSP+ program.

40. What is the total budget for technical assistance? Is there an average budget or range you are anticipating providing to each selected vendor?

- At this time, we are not able to share a budget estimate. Vendors are encouraged to propose a cost structure that is reasonable, competitive, and aligned with the scope of work and level of effort required.

41. And how many vendors are you looking to select?

- IPC is looking to develop a list of prequalified firms to support the implementation of the federally funded 'Powering America Together' Solar for All program. IPC does not have a target for the number of vendors prequalified under this RFP.

42. Does being a selected vendor preclude an organization from working as a developer for or having financial involvement in projects that receive funding from IPC?

- Being selected as a vendor under this RFP does not automatically preclude an organization from acting as a developer or from having financial involvement in projects that receive funding from IPC. However, any potential for conflict of interest will be carefully reviewed and addressed in accordance with 2 CFR § 200.112 and § 200.318(c)(1).

If a selected vendor is engaged in work that involves reviewing, scoring, evaluating, or influencing funding decisions for developer projects, they would likely be conflicted from also serving as a developer or holding a financial interest in those projects. In such cases, participation as both vendor and developer would not be permissible.

To ensure compliance and fairness:

- i. All potential conflicts must be disclosed in advance;
- ii. IPC may require the implementation of internal firewalls, recusals, or other mitigation measures; and
- iii. IPC reserves the right to limit a vendor's scope of work if their dual roles could compromise the integrity of the program.

Each situation will be reviewed on a case-by-case basis to ensure adherence to federal conflict of interest standards and maintain the integrity of the Solar for All program.

43. Is there a percentage or breakdown of funding to be used for each of the focus areas (multifamily housing and residential community solar) If awarded, when would work commence and funding be awarded to vendors?

- At this time, we are not able to share a percentage or breakdown of funding. Vendors are encouraged to propose a cost structure that is reasonable, competitive, and aligned with the scope of work and level of effort required.

IPC anticipates issuing notices of intent to award on or before June 27, 2025. Thereafter, IPC and SURE anticipate contracting with multiple contractors and that contractors prequalified under this RFP will contract for a term not to exceed four years. Contract terms, including work commencement and term, may vary based on the scope of services.

44. To what extent would becoming a prequalified vendor preclude members of our team from participating in your SFA offerings as a developer? Additional clarity on what's permissible from a compliance perspective would be appreciated!

- Being selected as a prequalified vendor under this RFP does not automatically preclude your organization—or members of your team—from participating in Solar for All offerings as a developer. However, if your organization is selected to provide services that involve evaluation, oversight, or decision-making related to developer applications or funding, this could present a real or perceived conflict of interest under federal guidelines.

From a compliance perspective, we are guided by 2 CFR § 200.112 (Conflict of Interest) and § 200.318(c)(1), which require the prevention of organizational conflicts where a party could gain unfair competitive advantage or influence the outcome of a federal program in which they also have a financial interest.

If your firm seeks to serve in both capacities (vendor and developer), we strongly recommend:

- i. Full disclosure of any overlapping roles at the time of proposal submission or engagement;
- ii. Maintaining internal firewalls to separate workstreams; and
- iii. Agreeing to recuse your firm from any work that may affect competitive standing or program administration decisions related to your development activities.

We are committed to ensuring a fair and compliant process and are happy to discuss specific scenarios to determine permissibility on a case-by-case basis.

45. If we would like to respond to both RFPs, may we include them in the same RFP response and simply submit an expanded Technical Approach and Scope Alignment section? Or would you prefer two separate RFP responses, even if there is overlapping content in the Letter of Transmittal, Organizational Background, Experience, Team and References, Cost Effectiveness and Commitment to Community Engagement and Equitable and Meaningful Impact sections?

- We are seeking proposals that respond to one or more of the scopes of work/services outlined in this RFP. If a Respondent wishes to additionally submit a proposal responsive to a different RFP issued by IPC or CPC, it should submit a separate response addressing that RFP. The same or similar content can be repeated similar across different RFP responses.

46. Are you able to share an available budget estimate for the two RFPs?

- At this time, we are not able to share a budget estimate for either of the RFPs. Vendors are encouraged to propose a cost structure that is reasonable, competitive, and aligned with the scope of work and level of effort required.

47. Can you clarify what you are looking for in this section- Commitment to Community Engagement and Equitable and Meaningful Impact? What information is required here? How does this relate to the scope?

- IPC will evaluate Commitment to Community Engagement and Equitable and Meaningful Impact based on a variety of factors, including track record of working with low-income and disadvantaged

communities. Examples to demonstrate this could include past projects or programs in these communities, the dollar amount of projects supported in these communities, experience working with and engaging low-income and disadvantaged communities or engaging through partnerships or community-based organizations. The Evaluation Criteria for Financing Applications outlined in Section 5 of IPC's [Financing Products Program Guidance](#) (see page 24-25) may be instructive.

1. What is the anticipated scale and frequency of ROC projects? Will they be concentrated in certain states?

- General information about the number and geographic dispersal of resident-owned communities of manufactured homes can be found on the [ROC USA website](#), but the number of ROC solar projects to be supported under IPC's Solar for All program is unknown. Information and services under obtained through this RFP may impact the number of ROC solar projects supported under IPC's Solar for All program.

IPC's Solar for All program covers AK, AL, AZ, CA, CO, CT, DE, FL, GA, HI, IA, ID, IL, IN, KS, LA, MA, MD, ME, MI, MN, MO, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, Puerto Rico, and the District of Columbia. The program's coverage is also displayed on [IPC's About Solar for All page](#).

48. Does IPC have targets or scoring preference for certified DBE participation or subcontracting?

- No, but IPC strongly encourages participation from certified DBE and small business firms. IPC and CPC members will actively perform outreach to such firms to ensure awareness of opportunities under Solar for All. Any such firm is invited to submit proposals, either as a prime contractor or as a subcontractor.

49. How prescriptive are the expectations around "universal decision-making models" for deal evaluation—should we tailor replicability across states and ownership types?

- Yes, CPC is generally looking to support and scale innovative solar models across the country. We anticipate projects that utilize a variety of ownership models and structures and are seeking replicability.

50. Do you have any additional details you can share on the expected scope and timing of the work? It looks like there may be more than one firm selected, and this is just a pre-qualification of firms, but I'm curious what this engagement is expected to look like should we be one of the firms selected through the RFP process.

- At this stage, the RFP is intended to establish a pre-qualified pool of firms that may be engaged on an as-needed basis. Multiple firms may be selected, and the actual scope, level of effort, and timing of work will vary based on program needs as they evolve during the grant period.

Selected firms may be issued task orders or work orders under a master agreement, with each engagement detailing the specific scope, deliverables, timeline, and budget. The types of work may range from short-term technical assistance or discrete analyses to longer-term support engagements, depending on the nature of the services and program priorities.

While we cannot guarantee specific volumes of work, firms in the pool will be considered for assignments based on expertise, availability, past performance, and cost competitiveness for the task at hand.

51. Does Scope of Work/Services #1, #2, and #3 include rural project types?

- Yes, financing support and modeling for rural residential community solar and multifamily solar projects is a priority area for IPC and CPC member organizations.

52. Does Scope of Work/Services #3 contemplate support for SURE's tech-enabled underwriting platform?

- Yes, Scope of Work/Services #3 includes support for SURE (Sustainable Underwriting for Resilience & Efficiency, LLC) to assist in integration of solutions into platform and program offering, including support in developing and implementing tech-enabled underwriting services, learning opportunities, and standardization of financing products for community-based lenders who may co-invest on CPC projects.

53. Is it intended that IPC and SURE will both be the service recipients to the winning respondent(s)? If so, will IPC and SURE together enter into a single contract or will there be one contract with each entity?

- Through this RFP, IPC intends to enter into contracts on behalf of itself and SURE after notification of award. SURE will not independently contract with respondents through this RFP. Contracts stemming from this RFP will broadly support the efforts of IPC, SURE, Community Housing Capital, Inc., NeighborWorks Capital Corporation, and ROC USA, and other CPC member organizations within this Solar for All program.

54. The scope mentioned that there will be lending partners, will a portion of the SFA award be suballocated to various CPC partners? If so, we assume that a successful respondent would need to enter into discrete contracts with each subrecipient, is that correct?

- Through this RFP, IPC intends to enter into contracts that support the work of IPC and other CPC member organizations, including SURE and CPC lending organizations, under our Solar for All program. While the existence of a contract with IPC may not preclude a respondent from entering into separate contracts with CPC member organizations, IPC will be the contracting party for contracts entered into with respondents through this RFP.

55. Does Scope item 3 relate to the types of projects referenced in scope items 1 and 2, or is there an additional or different asset class to which this scope item 3 applies?

- Scope of Work/Services #3 will support various ownership structures and project types beyond Scope of Work/Services #1 (multifamily housing solar projects) and Scope of Work/Service #2 (solar projects for resident-owned communities of manufactured homes). It includes a full range of residential community solar models including community-owned community solar and projects that incorporate storage and resilience and those that provide community benefits. We anticipate projects that utilize a variety of ownership models and structures, though it is difficult to give a complete list. Broadly, we seek to innovate models that build community wealth and produce community benefits.

56. Scope item 1.a includes ‘...consulting on capital stack support...’. Could you describe further what you anticipate these services to be?

- By consulting on capital stack support, we mean exploring co-investment opportunities (both public and private) and complementary sources of capital for solar project including ITC, RECs, crowdfunding, and community lending. This also includes assessing the viability of other lender co-investment with IPC’s Solar for All financial assistance.

57. Scope item 1.c seems to involve the review of legal contracts, is that correct? If so, would you expect that a licensed law firm be a part of the respondent team?

- No, IPC does not expect respondents to be part of a licensed law firm. Legal training may be instructive for approaches proposed but legal services are not being sought under this RFP. IPC has released a separate RFP for legal services.

58. Given that certain coalition members have expertise in various areas, for example in training for clean energy lending to multifamily projects, how do you envision the respondent complimenting that expertise, for example with regard to scope item 1.d or 1.e?

- The services being sought under this RFP are intended to complement the expertise and work

of IPC and other CPC member organizations, and in some cases provide inputs into activities of other coalition members' activities. The services being sought may be in areas or at depths beyond CPC members' expertise or capacity.

59. For scope 1, through what medium would best practice guides and case studies need to be developed (webinar, recorded trainings, in person trainings, print material, etc.)?

- It is possible a variety of media will be employed. The specific media are subject to confirmation and may vary depending on ongoing program developments and specific scopes of work and implementation priorities identified during contract or task order negotiation.

60. Please confirm if best practice guides and case studies will be white labeled or if attribution will be made.

- These details are subject to EPA and Solar for All terms and conditions, but respondents who produce outputs through these scopes of work/services should generally expect that they will be used to further the IPC's Solar for All program and will be branded and attributed accordingly.

61. In Scope 3, are the financial models exclusively for financial underwriting to assess financing requirements, and feasibility, or are the models also intended to be used for other financial reporting purposes?

- The financial models being sought under this scope of work/services may be used to support a variety of program aims, but a primary focus is on underwriting and replication/scaling.

62. Does project financing support/modeling/due diligence include counterparty and/or guarantor analyses, such as in scope item 3.f? If so, would the work in scope item 3.e. present a possible conflict in advising both parties to a financing transaction?

- No, the scopes of work/services outlined in this RFP are intended to support IPC and CPC member organizations in implementing our Solar for All program. As such, we do not anticipate conflicts to arise due to advising both parties to a financing transaction.

63. Does scope item 3.e contemplate in-person meetings with potential funders?

- IPC does not anticipate that any in-person meetings will be required as part of the scopes of work/services being sought, but this remains subject to confirmation and may vary depending on the specific scope of work and implementation priorities identified during contract or task order negotiation.

64. Do you anticipate that the solar project developers and contractors referenced in scope item 3.f have a baseline experience in the financing of solar projects and tax credits?

- IPC's Solar for All program will serve a wide range of solar project developers, including less mature organizations. Our program has a comprehensive suite of technical assistance to support organization newer to solar project financing and tax credits. We are seeking qualified respondents that will assist IPC and the CPC member organizations in meeting this Solar for All goal.

65. Given that certain coalition members have expertise in various areas, for example in financing solar projects, how do you envision the respondent complimenting that expertise, such as with regard to scope item 3.f?

- The services being sought under this RFP, including Scope of Work/Services #3.f., are intended to complement the expertise and work of IPC and other CPC member organizations, may be in areas or at depths beyond IPC or other CPC members' expertise or capacity, or may

allow IPC or other members to review more projects in parallel, depending on the volume and timing of deal flow.

66. What are the non-utility benefits that should be assessed when estimating minimum household savings?

- [U.S. Department of Housing and Urban Development's memorandum on the Treatment of Solar Benefits in Master-metered Building](#) (May 2023) provides various examples of non-utility benefits of solar projects including job training and workforce development, additional staff serving residents, facility upgrades, free or reduced internet service, financial literacy programs, wellness programs, shuttle services, community events, increased operating or replacement reserves for property, resilience, in-kind donations, and gift cards. We are awaiting further guidance from the U.S. Environmental Protection Agency about whether and how non-utility benefits should be assessed under Solar for All.

67. What data will be made available at the underwriting stage to quantify cost-effectiveness and savings, or should the consultant include in the SOW a task to define the necessary data inputs into the financial model?

- We are looking for robust modeling that can be tailored on a project-by-project basis for underwriting purposes. Applicants seeking financial assistance are required to provide a financial pro forma. Solar for All-supported projects require a 20% minimum household savings net of costs incurred by the LIDAC household over the period of performance. The Community Power Coalition's Household Savings Methodology [can be found here](#). It may also be helpful to review [IPC's Program Guidance](#) for its initial financial products, which includes detailed information on what data needs to be supplied as part of the application process (such data would then be available in underwriting).

68. Are there specific community solar policy factors that should be considered in this analysis, in addition to incentives and rebates?

- Incentives (including federal, state, and utility incentives), rebates, tax credits, RECs, compensation rates, permitting and interconnection are all policy factors that may be part of this analysis. Other non-policy factors such as system size, angle, and equipment (including potential pairing with battery storage), as well as environmental factors such as insolation and climate, may also be part of this analysis.

69. Do IPC and ROC need support identifying the target markets for deploying SFA funding based on adoption rate, current market penetration, and LIDAC communities?

- No. IPC and CPC lenders under the Solar for All program are required to procure their pipelines of projects to support with financing assistance. IPC and CPC lenders are not preselecting geographic deployment markets, beyond limiting deployment to the geographies covered by our program. Under IPC's financial assistance RFP, IPC evaluates intake forms and project applications as they are received. To be eligible, all projects must serve Low-Income and Disadvantaged Communities (LIDAC) as defined by the Solar for All Terms and Conditions. IPC's RFP evaluation criteria includes multiple considerations. IPC's evaluation criteria can be found in [IPC's Financing Products Program Guidance](#) on pages 24-25.

70. In how many cities would IPC and ROC look to deploy capital for solar projects for MFH?

- This information is unknown at this time and may depend on ongoing program developments, procured pipeline applications, and implementation priorities. IPC and CPC lenders have financial assistance deployment targets—the Coalition aims to deploy \$187 million in financial assistance over the period of performance across all the program models we are seeking to

scale—but does not have a goal for the number of cities where capital will be deployed.

71. Will the projects include enabling upgrades such as energy efficiency in addition to solar projects?

- Solar for All grant funds must be used for financial assistance and technical assistance to enable low-income and disadvantaged communities to deploy and benefit from rooftop residential solar and residential-serving community solar. Infrastructure to store solar-generated power for the purposes of maximizing residential rooftop and residential-serving community solar deployment that is deployed in conjunction with an eligible project is allowed, but neither stand-alone energy storage nor other energy efficiency upgrades or technologies are allowed.

72. In terms of estimating cost savings to tenants, would this be for multi-family properties that are both sub-metered and master metered?

- Yes, Solar for All supported multifamily projects require a 20% minimum household savings net of costs incurred by the LIDAC household over the period of performance, regardless of whether they are master-metered or individually metered. The Community Power Coalition's Household Savings Methodology, which has different frameworks for individually metered and meter-metered multifamily properties, [can be found here](#).

*****All other items remain the same*****
END OF ADDENDUM NO. 1