Request for Proposals

Solar for All IT Development Services

Issue Date: March 13, 2025

Due Date for Proposals: April 14, 2025

Section 1 - Background

Capital Good Fund ("Good Fund") is a nonprofit, U.S. Treasury-certified Community Development Financial Institution headquartered in Providence, RI. Founded in 2009, our mission is to create pathways out of poverty and advance a green economy through inclusive financial services.

In April of 2024, Good Fund was awarded a $156 million grant through the Environmental Protection Agency's Solar for All ("SFA") program to bring the benefits of solar energy to low-income households and communities. Good Fund's award is specifically intended to serve eligible households across the state of Georgia over a five-year period, ending in May of 2029.

To support program implementation, grant reporting, and a positive customer and contractor experience, Good Fund seeks qualified vendors to provide IT development services.

Section 2 – Purpose and Scope

Good Fund seeks qualified IT development firms to support two major projects in support of the Solar for All program–development of contractor and customer portals ("Portals") and development of a data warehouse/data lake and related reporting tools ("Reporting Scope"). While this solicitation will focus on these two priority scopes, Good Fund may offer the selected vendor additional scopes of work as necessary to support the Solar for All program.

Portals

Good Fund is both a developer and financier of solar energy and battery storage systems. Most systems are developed under a third party ownership ("TPO") model, in which Good Fund contracts with a solar engineering, procurement, and construction contractor ("EPC") for the design and construction of a solar project on a customer facility and subsequently recovers its upfront investment through monthly lease payments from the customer. Under this arrangement, Good Fund must collect data from both contractors and customers. Currently, this information is submitted through webforms that feed into Salesforce or document submissions through Box. However, this approach has several important limitations:

- Neither contractors nor applicants can know the status of an application, or receive alerts or errors when certain documents are missing, unless they email, call, or text Good Fund
- Contractors have no way of seeing all of their referrals, the status of those referrals, and required documents
- Contractors have no centralized place to upload requests for milestone payments, which includes submitting paperwork, photos, and bills of sale, creating a confusing and clunky process
- While our loan application does have a “save and complete application later” function, it is entirely email-driven, which creates a sub-optimal user experience
- After a lease or Power Purchase Agreement is signed, a customer has no way to look up their balance or monthly payment, make payments, change their contact information, or access a copy of their contract without calling, texting, or emailing Good Fund staff

The IT developer will be responsible for the following tasks related to the selection, customization, and integration of an off-the-shelf portal solution for our organization. The selected portal should be usable by both customers and contractors and must be integrated seamlessly with the Salesforce ecosystem. The scope includes the following services:

1. Needs Assessment and Product Selection

- Collaborate with key stakeholders within our organization to understand the requirements and use cases for both the customer and contractor portal.
- Research and recommend off-the-shelf portal solutions that meet the defined requirements, including features, scalability, security, and compatibility with the Salesforce ecosystem.
- Provide an analysis of the pros and cons of various portal products, including licensing, maintenance, and support considerations.
- Support Good Fund with the solicitation and review of quotes, bids, or proposals as needed to comply with federal procurement guidelines

2. Customization and Configuration of the Selected Portal

- Customize the selected portal product to meet the specific functional and design needs of our organization.

- Implement necessary configurations to support the portal's intended use for both customers and contractors, including user access management, role-based permissions, and data entry forms.
- Ensure the portal has responsive design (including mobile-optimization), intuitive user interfaces, and necessary integrations (e.g., email notifications, document uploads).
- Design and implement workflows, automations, and any needed business logic to streamline portal use.

3. Salesforce Integration

- Design and implement seamless data integration between the portal and the Salesforce ecosystem.
- Utilize Salesforce Apex Development to develop custom integrations for transferring data from the customer and contractor portal into Salesforce in real-time or on a scheduled basis.
- Ensure data is pushed into relevant Salesforce objects, maintaining data integrity and consistency.
- Implement secure authentication mechanisms to allow portal users to interact with Salesforce data without exposing sensitive information.
- Build and/or configure necessary APIs or middleware to ensure smooth data flow between the portal and Salesforce.

4. Security and Compliance

- Implement security best practices to safeguard data in transit and at rest, ensuring compliance with industry standards (e.g., GDPR, CCPA) and internal organizational policies.
- Ensure that role-based access control (RBAC) is configured correctly to restrict portal user access based on user roles (e.g., customers, contractors, admins).
- Work with our internal security and compliance teams to validate the security posture of the portal solution.

5. Testing and Quality Assurance

- Conduct comprehensive testing, including functional testing, integration testing, security testing, and user acceptance testing ("UAT") to ensure the portal works as expected.
- Provide detailed testing reports and resolve any identified issues prior to deployment.

- Perform performance testing to ensure that the portal performs efficiently under expected user loads.

6. Deployment and Training

- Assist in deploying the customized portal into a production environment, ensuring a smooth transition from development and testing.
- Provide training to key internal stakeholders (e.g., admin users) on how to configure, monitor, and manage the portal.
- Develop and deliver user guides and documentation for both the administrators and end-users of the portal.

7. Post-Deployment Support

- Offer post-deployment support to resolve any issues or bugs that arise after the portal is live.
- Provide ongoing maintenance and updates as necessary, including ensuring the portal remains compatible with new versions of Salesforce or other integrated systems.
- Assist in scaling the solution if required, accommodating future growth and evolving business requirements.

8. Project Management and Communication

- Manage the project timeline and deliverables, ensuring that the project stays on track and within the agreed-upon scope and budget.
- Maintain regular communication with project stakeholders to provide updates on progress, identify potential issues, and obtain feedback.
- Provide status reports and participate in meetings as needed.

Reporting Scope

The Solar for All grant requires semi-annual transaction- and project- level reporting. Reporting must be provided in an EPA-provided template in the units and format specified by the EPA. The provided template is an Excel "flat file" consisting of 376 total columns, 226 of which are required for our specific program.

The selected IT vendor will be responsible for the design, development, and implementation of a data storage solution (data warehouse, data lake, or similar) to collect, store, and prepare data for reporting. This solution will aggregate data from contractors, subrecipients, and clients, ensuring proper data validation, integration with relevant systems (such as Salesforce and accounting software), and readiness for extraction and reporting. The scope of services includes the following:

1. Needs Assessment and Data Architecture Design

- **Needs Analysis:** Collaborate with our organization's stakeholders to gather requirements for data storage, reporting needs, and integration with existing systems (Salesforce, accounting software).
- **Data Architecture Advisory:** Advise on the most appropriate data storage solution—data lake, data warehouse, or other structures—that aligns with our organization's current and future needs.
- **Design Data Model:** Develop an optimal data model for organizing and structuring the data from contractors, subrecipients, clients, and other sources to ensure that the data can be efficiently stored, validated, and queried.
- **Scalability & Performance:** Ensure that the designed architecture can handle growth in data volume over time and is optimized for fast queries and reporting, with an emphasis on scalability.

2. Data Integration and Collection

- **Data Collection from Various Sources:** Design and implement the process for extracting data from contractors, subrecipients, clients, Salesforce, and the accounting system into the central data storage platform.
- **Data Extraction Tools:** Develop tools or interfaces (e.g., APIs, ETL processes) to facilitate the extraction of data in the required formats from various systems.
- **Integration with Salesforce & Accounting Software:** Ensure seamless data flow from Salesforce and the accounting system to the data warehouse or data lake. This may involve custom integration with Salesforce objects or records and ensuring the proper mapping between systems.
- **Data Transformation:** Ensure that data from various sources is transformed into a consistent format that adheres to the reporting requirements (e.g., specific units, data structures, and any normalization of data as necessary).

3. Data Validation and Quality Assurance

- **Data Validation Framework:** Develop processes and mechanisms for validating incoming data to ensure accuracy, completeness, and that it is stored in the correct format. This includes ensuring data consistency between systems (Salesforce, contractors, subrecipients, clients, and accounting systems).

- **Error Handling & Monitoring:** Implement error handling and alerting systems to notify stakeholders if there are any issues with the data (e.g., incorrect format, missing values, inconsistencies).
- **Automated Data Quality Checks:** Build automated data quality checks (e.g., via scripts or tools) to ensure that data is constantly monitored and validated during the ingestion process.

4. Reporting and Data Extraction for Analysis

- **Reporting Template:** Work with our team to understand the reporting template. Ensure that the data storage structure supports the necessary data formats and units for accurate reporting.
- **Extraction Process Development:** Develop the extraction tools or mechanisms to pull the data from the storage system into the reporting template, skipping columns as necessary to reflect requirements for our specific program. Ensure the data is formatted according to the reporting template's requirements.
- **Business Intelligence (BI) Tools Support:** Provide advice on implementing Business Intelligence tools (e.g., Power BI, Tableau) to connect to the data warehouse or data lake for reporting and visualization.
- **Custom Reporting:** Support the development of custom reports or dashboards as needed for various stakeholders, ensuring that reports are aligned with the organization's needs.

5. Data Security and Compliance

- **Data Security Best Practices:** Implement security best practices for data storage, ensuring encryption at rest and in transit, role-based access control, and other mechanisms to protect sensitive data.
- **Compliance:** Ensure that the data storage solution meets relevant legal, regulatory, and internal compliance requirements (e.g., GDPR, CCPA, HIPAA) and that any personally identifiable information (PII) is handled securely.
- **Audit and Access Logs:** Set up audit logs and access control policies to ensure that data access and modifications are traceable.

6. System Integration and Communication

- **Salesforce Integration:** Ensure that the data stored in the central system can be synced or communicated back to Salesforce, with the proper custom objects and records created or updated as needed.

- **Accounting Software Integration:** Facilitate the flow of relevant data between the data warehouse or data lake and the accounting software, ensuring that both systems are synchronized.
- **APIs and Middleware:** Design and implement any necessary APIs, middleware, or custom connectors to ensure seamless communication between systems.

7. Testing and Quality Assurance

- **Testing of Data Integration:** Conduct thorough testing of all data extraction and integration processes to ensure data is transferred accurately, and that no data is lost or corrupted during the process.
- **Performance Testing:** Ensure that the data storage solution is optimized for fast performance, even with large datasets, and that queries and data extractions can be executed efficiently.
- **User Acceptance Testing (UAT):** Work with key stakeholders to perform user acceptance testing of the reporting templates, ensuring the outputs meet their needs before deployment.

8. Deployment and Training

- **Deployment:** Deploy the data warehouse or data lake solution to a production environment, ensuring smooth data migration from existing systems (if applicable).
- **Documentation:** Provide comprehensive documentation on the architecture, processes, and tools used, as well as any custom integrations built.
- **Training:** Train internal teams on how to use and maintain the data solution, covering areas such as data validation, reporting generation, and system troubleshooting.

9. Post-Deployment Support and Maintenance

- **Ongoing Support:** Provide ongoing support for troubleshooting issues related to data extraction, reporting, and system performance.
- **System Updates & Maintenance:** Offer maintenance services to ensure that the data system stays up-to-date with any necessary software upgrades or patches.
- **Scalability and Optimization:** Provide recommendations on optimizing and scaling the system as data volumes grow or business needs evolve.

Section 3 - Additional Scope

While this RFP is initially focused on the previous two scopes, Good Fund envisions selecting a vendor that can scale to meet our broader SFA technology implementation needs. These may include assisting with the automation of processes (such as credit underwriting and property-ownership verification); enhancing or overhauling our lease application (for instance, switching from Form Assembly to a better tool); and strengthening the integration between our accounting software and our lease / PPA-servicing software. The selected vendor should demonstrate an ability to nimbly provide IT support and development services to meet a broad range of needs.

Section 4 - Contract Term

The contract will continue from the date of execution until completion of the entire scope of services. As noted in Section 3, Good Fund may, at its discretion, negotiate additional scope items as needed.

Section 5 – Schedule

The schedule for this RFP is given below and is subject to change. If Good Fund changes the schedule before the Proposal Due Date, it will communicate the change via email to all respondents who have submitted the optional notice of intent.

RFP Issued	March 13, 2025
Q&A Period	March 13 - 28, 2025
Optional Notice of Intent Due (Respondents will receive Q&A submissions from other Proposers and the corresponding responses)	March 28, 2025 (5 pm EDT)
Proposals Due	April 14, 2025 (5 pm EDT)
Virtual Interviews (if needed)	April 28 - May 2, 2025
Anticipated Decision	May 5, 2025

Section 5 – Proposal Format

A. **Technical Proposal**
   - **Transmittal Letter –** At a minimum, this letter will identify the Proposer; provide the name, title, phone number, and email address for the contact person who is authorized to answer questions about the RFP response; and provide the name, title, phone number, and email address for the contact person who is authorized to enter into a contract with Good Fund.
   - **Organizational Experience –** Provide background information on the firm, including any planned subcontractors. Include examples from other projects of similar scope and complexity, including details about the scope of work, whether the project was completed on time and on budget, and key

outcomes. Be sure to describe the firm's experience with the scopes of work described in Section 2 and the additional scope items contemplated in Section 3. Additionally, please provide three references with direct knowledge of or involvement in projects of similar scope and complexity (these do not have to be the same examples cited earlier but should be sufficiently comparable to the scope of work outlined in this RFP). Please be sure to notify your references that you will be using them and ensure the contact information that you provide is up to date.

- **Personnel Experience** – Provide the names, titles, educational backgrounds, relevant certifications, and professional experience for all individuals who will be involved in the project, including subcontractors. Resumes should be provided as an attachment. Identify a project manager to serve as the key point of contact for the project.
- **Approach and Work Plan –** Provide a suggested timeline and work plan for completing the activities described in the scope of work. Be as specific as possible about the approach and rationale, the nature and duration of each activity, the support needed from Good Fund staff, and any information that needs to be accessed. Proposers should also suggest a procedure for reporting on project status, a Proposal for how information should be shared and coordination should occur, and include a project organization chart linking deliverables or activities to specific staff members.

B. Financial Proposal

- Proposers are invited to propose a payment structure that best suits the nature of their proposed work. This may be on a time and materials basis or a project fixed-cost bid. For time and materials proposals, please include hourly rates for key personnel and anticipated hours needed for each service or deliverable.

- If the respondent is an individual consultant, the maximum allowable rate is $91.95/hour or $735.60/day. This is set by the EPA. This does not apply to firms or businesses. Individual consultants may bid on a fixed rate basis as well.

- For your price proposal, please only provide pricing for the two scopes of work outlined in Section 2. Subsequent scopes of work will be negotiated as needed.

- Do not include the portal or data lake/warehouse cost estimates in the proposal.

Section 6 – Proposal Submission

Proposals must be submitted in the following manner:

- **Proposals must be submitted by email with the subject line "Solar for All IT Developer Services" to Alicia Brown, Director of Georgia BRIGHT, by 5 pm EDT on April 14, 2025 at aliciab@capitalgoodfund.org.**

No Proposals or corrections/additions to submitted Proposals will be accepted after the Proposal Due Date and time unless explicitly requested by Good Fund. Proposals that are submitted after the Proposal Due Date and time will not be scored.

Proposals that are not submitted in the format requested will not be scored. Proposals that do not contain all of the required information will not be scored.

All costs incurred in the preparation of the Proposal shall be borne by the Proposer alone, and Good Fund shall not contribute, in any way, to the cost of the preparation of the Proposal.

Any and all documents developed by the Proposer during the course of this project will be provided to Good Fund upon request and will become the property of Good Fund, and the Proposer shall not assert any claims arising under copyright or otherwise inconsistent with the transfer of ownership of such documents.

Good Fund reserves the right to:

- Accept or reject any and all Proposals and/or bids if Good Fund, in its sole discretion, determines that it is in its best interests to do so.
- Rebid this RFP, requesting new Proposals from qualified firms.
- Waive or modify minor irregularities in Proposals received.
- Negotiate with Proposer(s), within the requirements of this RFP, to best serve the interests of the Solar for All program.
- Require the submission of modifications or additions to Proposals as a condition of further participation in the selection process.
- Fund any Proposal in full or in part
- Not make an award at the end of the evaluation process; this RFP is not to be interpreted or construed to guarantee that one or more Proposers submitting responses will be awarded contracts.
- Adjust the RFP Calendar of Event dates for whatever reason it deems appropriate.
- Contact Proposer to clarify any portion of the Proposer's submittal.

Section 7 – Questions and Answers

From the issuance date of this RFP, until a contract is awarded to a Proposer, there may not be communications concerning the RFP between any supplier who expects to submit a Proposal and any employee of Good Fund involved in the issuing of the RFP. The only exception is provided through the submission of written requests for clarification during the specified Q&A period.

Prospective Proposers may make inquiries or seek clarifications regarding this RFP any time during the inquiry period listed in the RFP Calendar of Events. To make an inquiry, prospective Proposers must email Alicia Brown, Director of Georgia BRIGHT, at aliciab@capitalgoodfund.org. Questions submitted after the allotted Q&A period will not receive a response.

Prospective Proposers submitting inquiries will receive an acknowledgment by e-mail that their inquiry has been received. The prospective Proposer who submitted the inquiry will not receive an individual e-mail response to the question but will instead receive an email answering all questions received from Proposers by the end of the Q&A period. This email will be sent to all Proposers submitting the optional notice of intent.

Section 8 – Scoring of Proposals

Proposals will be scored by an evaluation committee on the following merits:

- Qualifications of the firm and key personnel – 40 points
  - Qualifications and experience of the firm – 10 points
  - Project examples – 15 points
  - Qualifications of key personnel – 15 points
- Project Approach and Work Plan – 35 points
  - Project Approach – 15 points
  - Work Plan and Timeline – 15 points
  - Communication and Coordination Strategy – 5 points
- References – 5 points
- Cost – 20 points

Section 9 - Terms and Conditions

This procurement is subject to all applicable federal and state laws and regulations. Good Fund encourages participation from small businesses, including Disadvantaged Business Enterprises (DBEs), minority-owned, women-owned businesses, and labor surplus area firms. Contractors must not be debarred or suspended from receiving federal funds.

The following terms and conditions, when applicable, are incorporated by reference and apply to this solicitation and resulting contract(s), and may need to be flowed-down to lower-tier subcontractors:

For All Solicitations and Contracts

- 2 CFR 200.322: DOMESTIC PREFERENCES FOR PROCUREMENTS
- 2 CFR 200.216 PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
- 40 CFR 33 APPENDIX A TERM AND CONDITION:

"The contractor shall not discriminate on the basis of race, color, national origin or sex in the performance of this contract. The contractor shall carry out applicable requirements of 40 CFR part 33 in the award and administration of contracts awarded under EPA financial assistance agreements. Failure by the contractor to carry out these requirements is a material breach of this contract which may result in the termination of this contract or other legally available remedies."

For All Solicitations and Contracts in Excess of $10,000

"All contracts in excess of $10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement."

For All Solicitations and Contracts in Excess of $150,000

- 42 USC 85 CLEAN AIR ACT
- 33 USC 26 FEDERAL WATER POLLUTION CONTROL ACT

By submitting a proposal, your entity agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 USC 7401-7671q) and the Federal Water Pollution Control Act as amended (33 USC 1251-1387).

For All Solicitations and Contracts in Excess of $25,000

- 2 CFR 180 DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 & 12689)

For All Solicitations and Contracts Equal to or in Excess of $25,000

- 2 CFR 1532 NONPROCUREMENT DEBARMENT AND SUSPENSION

For All Solicitations and Contracts in Excess of $100,000

- 31 USC 1352 LIMITATION ON USE OF APPROPRIATED FUNDS TO INFLUENCE CERTAIN FEDERAL CONTRACTING AND FINANCIAL TRANSACTIONS

By submitting a proposal, your entity certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization 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.