



Request for Proposals
for Technical Assistance for Federal Funding Opportunities in the Inflation Reduction Act

Issued by: Philadelphia Energy Authority

Released: March 6, 2023

Responses Due: April 21, 2023

1. Purpose

The purpose of this Request for Proposals (“RFP”) is to solicit pricing proposals from consulting firms (“Consultant”) to provide technical assistance in designing and implementing the Philadelphia Energy Authority’s (“PEA”) strategic plan to maximize Philadelphia’s Inflation Reduction Act (“IRA”) funding potential.

In particular, PEA is seeking technical assistance in how to best prioritize, sequence, and blend the different types of funding streams available in the IRA for maximum benefit to Philadelphia, including:

- Consumer rebates
- Tax credits and incentives
- Formula funding
- Competitive grants

2. Background

2.1 About the Philadelphia Energy Authority

The Philadelphia Energy Authority is an independent municipal authority established in 2010 focused on issues of energy affordability and sustainability for Philadelphia. In 2016, PEA and City Council President Darrell Clarke launched the Philadelphia Energy Campaign, a \$1 billion, 10-year investment in energy efficiency and clean energy projects to create 10,000 jobs. Through 2021, PEA has helped launch over \$291 million in projects, and created over 2,500 jobs. Learn more at <http://www.philaenergy.org/>.

PEA is a municipal authority and political subdivision of the Commonwealth of Pennsylvania, formed by the City of Philadelphia under the Pennsylvania Municipality Authorities Act, 53 Pa.C.S. § 5601 *et. seq.* (“the Act”) for the purposes described in the Charter and included below:

The Authority’s purposes and responsibilities shall be limited to actions for and concerning (i) the development, facilitation and/or financing of energy storage and/or generation projects, (ii) the development, facilitation and/or financing of energy efficiency projects, and (iii) the purchase or facilitation of energy supply and energy services on behalf of the City of Philadelphia, government agencies, institutions and businesses, as well as the education of consumers regarding choices available in the marketplace, and (iv) the promotion of a vital clean energy sector of the Philadelphia economy and increased employment in the sector by undertaking efforts to strengthen the markets for energy efficiency and energy storage and generation projects. The Authority shall have and may exercise all of the powers set forth in the Act that are necessary or convenient for carrying out its purposes and responsibilities.

In 2021, PEA supported the launch of its green bank affiliate, the Philadelphia Green Capital Corp (PGCC). PGCC's mission is to connect projects to capital to drive a robust, equitable, clean energy market in Philadelphia, support PEA, and respond to the local challenges of climate change. PGCC uses proven green bank tools to unlock capital for clean energy projects, to scale and amplify PEA's current work, and to bring new financial products to the Philadelphia region's clean energy economy.

2.2 About the Inflation Reduction Act

The Inflation Reduction Act ("IRA") is a once-in-a-generation opportunity to bring as much as \$5 billion in climate funding to Philadelphia. The recently passed IRA includes \$369 billion in federal climate-related funding with a focus on equity. It also provides for unrestricted funding in the form of tax credits available both directly to the City and to its citizens and businesses. Philadelphia is well-positioned to receive funds as a leader in building an equitable clean energy economy.

PEA is leading the City of Philadelphia's IRA strategy in partnership with the City of Philadelphia's Office of Sustainability. PEA leads programs and projects that align closely with the goals of the IRA.

3. Scope of Work

3.1 Project Objectives

The engagement is focused on but not limited to, the following objectives:

- Conducting a strategic landscape scan of the IRA funding to provide direction to PEA/PGCC on current and future projects and programs using a SWOT (strengths, weaknesses, opportunities, and threats) analysis and/or other tools by:
 - Synthesizing PEA and PGCC's existing program and project funding strategies and sources
 - Synthesizing federal funding timing, eligibility, and parameters, including reporting requirements and match requirements, if applicable
 - Providing key recommendations for blending existing and future funding sources for each core programming area
 - Providing key recommendations for technical project scoping related to certain funding streams
 - Incorporating input from local partners on programs and projects that may complement PEA/PGCC's offerings and/or may be eligible for join IRA funding opportunities
- Supporting pursuit of specific grant opportunities and mapping the key players in receiving and distributing various sources of funding

3.2 Project Assessment

These objectives will require an assessment of PEA and PGCC's existing programs, partnerships, projects, and funding sources, including:

- Residential (Built to Last and Solarize Philly)
- Commercial and Multifamily (Solarize Philly, Commercial Property Assessed Clean Energy (C-PACE) financing)
- Workforce development (Bright Solar Futures and Green Retrofit Immersive Training Programs, Good Jobs Challenge, and partner programs)
- Municipal and institutional energy savings and renewable energy projects in partnership with the City of Philadelphia Office of Sustainability and the School District of Philadelphia
- Philadelphia Green Capital Corp. (Navigator Pre-Development Loan, Catalyst Term Loan, LMI solar opportunities)

Relevant staff contacts and existing materials for each program area will be made available to the selected vendor as needed.

3.1 Project Deliverables

Deliverables include but are not limited to:

- A visual roadmap of goals, objectives, and anticipated outcomes from the strategic landscape scan that can be shared with external partners
- A complementary internally-facing roadmap of funding opportunity timeline, application strategy, staff capacity needs, and funding match needs
- Recommendations for new or expanded programs that leverage IRA dollars to fill gaps in service
- Assistance with preparing strategy for and responses to funding opportunity announcements (FOAs) throughout the duration of the project period (e.g. Greenhouse Gas Reduction Fund)
- Providing staff with up-to-date information to assist with preparing public-facing fact sheets, cross-sector social media content messaging, and Powerpoint presentations for each core programming area
 - Examples include:
 - Resources that outline a customer journey through PEA's existing and future programs
 - Case study examples

4. Proposal Specifications

4.1 Anticipated Timeline

Milestone	Target Date
RFP released	Wednesday March 6, 2023
Deadline to submit questions	Friday, March 24, 2023
Question responses posted	Friday, March 31, 2023
Proposals submitted	Friday, April 21, 2023
Finalist interviews (estimated)	Week of May 8, 2023
Final selection announced (estimated)	Week of May 22, 2023
Project start (estimated)	Week of June 5, 2023
Project completion (estimated)	December 31, 2023

4.2 Questions

All questions regarding this RFP must be submitted by email to info@philaenergy.org with the subject line “Questions - IRA RFP”. No questions will be considered by phone.

Responses to questions received before 5pm on Friday, March 24, 2023 will be posted on the RFP page on the PEA website (www.philaenergy.org). Contractors responding to this RFP are urged to check the website for the responses to the questions. All responses will be issued by 5pm on Friday, March 31, 2023. Oral responses by any PEA employee or agent of PEA are not binding and shall not in any way be considered as a commitment by PEA.

4.3 Proposal Deadline

Respondents to this RFP must submit an electronic version of all requested documents by email to info@philaenergy.org with the subject “IRA RFP Response - [Firm Name]” no later than 5pm on Friday, April 21, 2023. Responses received after the deadline will not be considered.

4.4 The Philadelphia Tax and Regulatory Status and Clearance Statement

It is the policy of the City of Philadelphia and PEA to ensure that each Contractor and subcontractor has all required licenses and permits and is current with respect to the payment of City taxes or other indebtedness owed to the City (including, but not limited to, taxes collected by the City on behalf of the School District of Philadelphia), and is not in violation of other regulatory provisions contained in the Philadelphia Code. To assist PEA, through the City of Philadelphia Department of Revenue and Department of Licenses and Inspections, in determining this status, each Respondent is required to submit with its proposal the certification statement entitled City of Philadelphia Tax and Regulatory Status and Clearance Statement

which is attached to this RFP as **Appendix A** and a Tax Compliance Certificate from the City of Philadelphia which can be requested at <https://rev.phila.gov/taxcompliance/>.

If the Respondent is not in compliance with the City's tax and regulatory codes, an opportunity will be provided to enter into satisfactory arrangements with the City to achieve compliance. If satisfactory arrangements cannot be made, Respondents will not be eligible for award of the contract contemplated by this RFP.

The pre-approved Respondent will also be required to assist PEA in obtaining the above information from its proposed subcontractors. If a proposed subcontractor is not in compliance with City Codes and fails to enter into satisfactory arrangements with the City, the non-compliant subcontractor will be ineligible to participate in the contract contemplated by this RFP and the pre-approved Respondent may find it necessary to replace the non-compliant subcontractor with a compliant subcontractor. Respondents are advised to take these PEA policies into consideration when entering into their contractual relationships with proposed subcontractors. If a Respondent or a proposed subcontractor is not currently in compliance with the City's tax and regulatory codes, please contact the Revenue Department to make arrangements to come into compliance at 215-686-6600 or revenue@phila.gov.

Respondents need not have a City of Philadelphia Business Income and Receipts Tax Account Number (formerly Business Privilege Tax Account Number) and Commercial Activity License Number (formerly Business Privilege License Number) to respond to this RFP, but will be required to obtain both prior to commencing work if pre-approved for award of the contract contemplated by the RFP¹. Applications for a Business Income and Receipts Tax Account Number or a Commercial Activity License² may be made online by visiting the City of Philadelphia Business Services Portal at <https://business.phila.gov/> and selecting eCLIPSE to submit online applications. If you have specific questions, call the Department of Revenue at 215-686-6600 for questions related to City of Philadelphia Business Income and Receipts Tax Account Number or the Department of Licenses and Inspections at 215-686-2490 for questions related to the Commercial Activity License.

4.5 Notice to State Requested Exceptions to Contract Terms and Conditions

PEA's Program Services Agreement is attached to this RFP as **Appendix B**. By submitting a Proposal in response to this RFP, the Respondent agrees that, except as provided here, it will enter into a contract with PEA containing substantially the Contract Terms and Conditions contained in **Appendix B**.

¹ Respondents that have a Business Privilege Tax Number should use that number, as it is automatically their Commercial Activity License Number, and need not apply for a new Commercial Activity License Number. Similarly, Respondents with a Business Privilege Tax Account Number should use that number as their Business Income and Receipts Tax Account Number.

² Commercial Activity Licenses are not typically required for non-profit organizations; however, Business Income and Receipts Tax Account Numbers typically are required.

If Respondent wishes to request revisions to the attached Contract, respondents must provide an annotated copy of the Contract with the requested revisions. For each requested revision, the Respondent must propose alternative language or terms using tracked changes and state the reason for the request in a comment.

Requested exceptions to PEA's Contract Terms and Conditions will be approved only when PEA determines in its sole discretion that a Requested Revision makes business sense, does not pose unacceptable risk to PEA, and is in the best interest of PEA. By submitting its proposal, the Respondent agrees to accept all Contract Terms and Conditions to which it does not expressly seek a Requested Revision in its proposal. Blanket reservation of rights to exceptions to the full contract will not be accepted. PEA reserves the right, in its sole discretion, to evaluate and reject proposals based in part on whether the Respondent's proposal contains Requested Revision to Contract Terms, and the number and type of such requests and alternative terms proposed.

If, after PEA issues its notice of intent to contract to a Respondent, the Respondent seeks Requested Revision to Contract Terms that were not stated in its proposal, PEA may, in its sole discretion, deny the Requested Revisions without consideration or reject the proposal.

PEA reserves the right, in its sole discretion, (i) to waive any failure to comply with the terms of this Notice if it determines it is in the best interest of PEA to do so; and (ii) to require or negotiate terms and conditions different from and/or additional to the Contract Terms and Conditions in any final contract resulting from this contract opportunity.

4.6 Proposal Requirements

Respondents are encouraged to be concise and to respond as directly as possible to the requirements set forth in this RFP. The requirements set forth in this Section represent the minimum content required and, unless expressly stated otherwise, are not intended to limit substantive content. It is the Respondent's responsibility to include information in the Proposal that meets the minimum content requirements and any additional information that further demonstrates relevant experience and capabilities.

Part I: Provider Info

- Include your legal business name
- Include address of company headquarters
- Include main point of contact for the RFP response with contact information
- Include a brief organizational description and list of services offered related to the scope of services
- Provide the number of employees and a breakdown of those in Pennsylvania and in Philadelphia

- Indicate if your business is a Local Business Entity (LBE)³ in Philadelphia and/or is certified as a Minority-/Woman-/Disabled-Business Enterprise (M/W/DBE) and if so, which entity did the certification
- Include a description of your company's efforts to increase diversity, equity, and inclusion within the company and/or your local community
- Describe your company's commitment to recruiting candidates for new positions who reside in the City of Philadelphia, who identify as minorities, women, disabled, returning citizens, and/or veterans

Part II: Project Delivery

- Include a narrative approach that specifies how proposed objectives, assessment, and deliverables would be achieved
- Include proposed project timeline with key milestones (if applicable)
- Include the proposed staff list and responsibilities of each. Include bios of key staff.
- Include dependencies and assumptions including access to PEA/PGCC staff and related program and project background materials
- Include the project budget with hourly rates for each staff person

Part III: Capabilities & Experience

- Describe 2 relevant projects, which should ideally contain at least two of the following: similar project structure, similar scope of work, or a similar industry/government client. Descriptions should include: business context, project scope, your role in the project, the size and structure of the program team, key metrics and results, and any lessons learned
- Include two (2) customer references, a brief description of your work with them, and contact information for each

4.7 Evaluation Criteria

Proposals in response to this RFP will be evaluated by the project team based on the following criteria:

- Relevant experience, qualifications, and references
 - Experience with federal funding requirements and federal tax incentives
 - Successful case studies for similar projects providing technical assistance and strategic planning support
 - Satisfied customer references
- Work plan, staffing and schedule
 - Realistic overall timeframe to start and complete the work
 - Adequate time allocated to key tasks, including discovery, design, and implementation
 - Appropriate resources to complete the work in the proposed timeline

³ <https://www.phila.gov/services/business-self-employment/bidding-on-a-city-contract/get-certified-as-a-localbusiness-entity/>

- Appropriate delivery methodology
- Value, pricing, and contract terms
 - Pricing structure proposed (hourly rates + actual expenses)
 - Alignment of contract terms
- Alignment with PEA mission, vision, and values
 - Support for local jobs and economic development
 - Diversity and equity
 - Experience and expertise in working with government entities in Philadelphia and Pennsylvania

5. Public Disclosure and Confidential Information

All Responses, Exhibits, and other information submitted in response to this RFP are subject to the public disclosure requirements of applicable law, including the Pennsylvania Right to Know Law. To the extent permitted by applicable law, PEA will use its best efforts to keep from public access the specific information that is identified by the Contractor as confidential. If a Contractor claims an exception to public disclosure requirements and desires that PEA keep certain information from public disclosure, then the Contractor must include a notice in the Proposal as follows:

“Confidential Information Notice Pages _____ of this Proposal, identified by a bold vertical line along the right-hand margin, contain information that is excluded from public disclosure under applicable law. Contractor requests that such marked information be utilized by PEA only for evaluation of this Proposal, but Contractor understands that PEA is bound by applicable law and that such information may be disclosed in accordance with such law.

Notwithstanding any such notice, however, PEA may disclose such marked information to individuals participating in the review or evaluation of Proposals, including members of the Selection Committee, other PEA employees, and advisors, attorneys, and consultants.

6. PEA’s Additional Procurement Rights

PEA reserves the right to modify this selection process, which may be exercised in its sole discretion at any time during the procurement process to:

- Cancel this RFP or the procurement process, with or without the substitution of another pre-qualification or procurement process;
- Waive any informality, defect, non-responsiveness, or deviation in a Proposal, or other submission, that is not material;
- Require one or more Contractors to supplement or clarify the Proposal or to provide additional information after the submission of Proposals including with respect to any exceptions to PEA’s Contract Terms and Conditions;
- Take any action affecting the RFP process that would be in the best interests of the PEA or City;
- Conduct investigations and make inquiries concerning any aspect of any Proposal;

- Reject any or all Proposals;
- Reject a Contractor that has been delinquent or unfaithful in the performance of any contract with or obligation to the PEA or City is financially or technically incapable, or is otherwise not responsible; and/or
- Make judgments about the contents of any Proposal with respect to the requirements and criteria set forth in this RFP.

7. Costs

Any and all costs incurred by the Contractor, or other party in connection with this RFP or other aspect of the procurement process shall be at such party's expense and risk. PEA accepts no liability and will not be responsible under any circumstance for any cost or expense incurred to respond to this RFP or otherwise participate in the procurement process.

[Appendix A: City of Philadelphia Tax Status and Clearance Statement](#)

[Appendix B: PEA Program Agreement for IRA Technical Assistance](#)