



**Montgomery County Green Bank**

**REQUEST FOR QUOTATIONS**

**RFQ Issue Date: June 17, 2020**  
**Response Submission Due Date: July 2, 2020**  
**Send to [RFP@mcgreenbank.org](mailto:RFP@mcgreenbank.org)**

**I. SUMMARY**

The Montgomery County Green Bank Corporation (“Green Bank”) is issuing this Request For Quotations (“RFQ”) for experienced commercial energy efficiency consultants (“Consultant(s)”) that have familiarity with the energy efficiency and clean energy financing and funding programs, including rebate and incentive programs offered by utilities, that serve commercial ratepayers in Montgomery County, MD. The Consultant selected under this RFQ will work closely with the Green Bank to market and promote its commercial financing for energy efficiency and renewable energy products presently, or to be offered in the market.

The Consultant will work closely with the senior leadership of the Green Bank, providing their expertise and feedback from the market to most effectively conduct outreach and develop interest in using the Green Bank commercial programs to undertake energy efficiency or renewable energy improvements. The Consultant also will support development of operational documentation necessary for some of the commercial products.

**An individual, nonprofit or for-profit firm may respond to one or more tasks of this RFQ;** however, all respondents should be located within the greater DC-metropolitan area, as we prefer familiarity with the Montgomery County, MD energy efficiency and renewable energy market, EmPOWER MD utility program requirements serving County residents and the utility-approved Consultants.

Final quotations are due July 2, 2020.

**II. ABOUT US**

The Montgomery County Green Bank is Montgomery County’s designated green bank, a publicly chartered, 501(c)3 nonprofit dedicated to accelerating affordable clean energy and energy efficiency investment in the County. We partner with the private sector to build a more inclusively prosperous, resilient, sustainable, and healthy community. Our work supports Montgomery County’s goal to reduce its greenhouse gas emissions.

The Green Bank was designated as Montgomery County’s green bank in August of 2016 by Montgomery County, Maryland. As the nation’s first full-scale clean energy finance authority at the local level, the

Green Bank will use public and private funds to drive investment in the Montgomery County clean energy market.

### **III. BACKGROUND**

The Green Bank has several products and programs in place or in development to serve commercial property owners to improve energy efficiency and renewable energy projects. These include:

- The Commercial Loan for Energy Efficiency and Renewables (CLEER)
- Commercial Solar Power Purchase Agreement
- Small Business Energy Savings Program
- Common Ownership Community Technical Assistance
- Request for Financing Proposals
- Others

The Green Bank is in need of assistance to market these products to stakeholders and interested users to both inform and instill use of the products and programs. The Green Bank would like to increase the implementation of energy efficiency and renewable energy measures by commercial property owners in the County and offer its financing products as a tool to achieve this increase.

The programs and products use relationships with energy performance Consultant partners to carry out implementation of the financing and measures.. Each of these partners have established contractual relationships for the products. The Green Bank would like to increase the participation of energy performance Consultants in the programs.

The launch of the products and programs require development of operational processes to manage the programs. The Green Bank would like support with these operational processes.

### **IV. CONSULTANT SERVICES BEING REQUESTED**

The Green Bank is seeking the services of a consultant to expand the capacity of Green Bank and perform the below functions. The Green Bank has indicated an estimated amount of time that a consultant could spend on each task. While much of the effort is expected to be done remotely (particularly in the current Covid-19 situation), the effort required for Tasks 1, 2, and 3 may necessitate travel to support outreach to identify prospects and such travel is to be coordinated with the Green Bank.

- **Task I: Small Business Energy Savings Program**
  - Working with the Green Bank and its models of existing controls (and possibly other models available from peer organizations), develop the operational controls and procedures for the program.
  - Develop simple promotional tools for the program, including those on the Green Bank website.
  - Conduct direct outreach to stakeholders about the program to inform about the Green Bank's program and effort.
  - Conduct strategic outreach to potential users of the product to inform and help them understand how the product could be of benefit.
  - Manage a pipeline of opportunities in Salesforce and maintain supporting contact with prospects to support progress toward closings.

- Target: Identify at least 5 strong prospects for the product that can close within the first 4 months of the program.
- **Task 2: Commercial Solar PPA Program**
  - Working with the Green Bank and its models of existing controls (and possibly other models available from peer organizations), develop the operational controls and procedures for the program.
  - Develop simple promotional tools for the program, including those on the Green Bank website.
  - Conduct direct outreach to stakeholders about the program to inform about the Green Bank's program and effort.
  - Conduct strategic outreach to potential users of the product to inform and help them understand how the product could be of benefit.
  - Manage a pipeline of opportunities in Salesforce and maintain supporting contact with prospects to support progress toward closings.
  - Target: Identify at least 5 strong prospects for the product that can close within the first 4 months of the program.
- **Task 3: The Commercial Loan for Energy Efficiency and Renewables (CLEER)**
  - Conduct direct outreach to stakeholders about the program to inform about the Green Bank's program and effort.
  - Conduct strategic outreach to potential users of the product to inform and help them understand how the product could be of benefit.
  - Manage a pipeline of opportunities in Salesforce.
- **Task 4: Additional Efforts**

The Green Bank is conducting due diligence on an additional program activity which will require consultant support in developing documentation and processes. A consultant familiar with energy efficiency financing would have the skills to undertake this work. This assignment would be done on a dedicated time basis, and which time could be increased depending on the needs. A specific scope of work will be provided as this product approaches implementation.

## V. QUALIFICATIONS

The Green Bank is seeking accomplished consultants who can expand our capacity to undertake the tasks described above. Depending upon the task for which a respondent will be providing a bid, one or more of the below qualifications may apply:

- 5 or more years' experience in commercial energy efficiency and renewable energy activities.
- Substantive knowledge and experience in energy efficiency and renewable energy financing.
- Consultant must be located in the immediate Washington, DC metro region.
- Strong business development and client/customer management / sales skills.
- Demonstrated comfort with conducting all levels of outreach to customers and managing customers through a process.
- Knowledge of Montgomery County utility's commercial rebate and incentive programs.

- Ability to collaborate and coordinate with internal and external parties.
- Experience in developing and documenting operational procedures for financial products.
- Proven track record of adhering to, and meeting timelines and budgets.
- Attention to detail.

**VI. TERM OF ENGAGEMENT**

The Green Bank estimates the time per Task as follows. As the contract is performed, hours may shift between tasks, but the overall hours of the contract will not increase without written agreement of the Green Bank and the Consultant.

Task 1	100 hours over 12 weeks. Estimated at 8 hours per week.
Task 2	32 hours over 8 weeks. Estimated at 4 hours per week.
Task 3	36 hours over 12 weeks. Estimated at 3 hours per week.
Task 4	Budgeted at 30 hours

**VII. FEES & COMPENSATION**

Using the above timeframes as a guide, Consultant should propose a fee for each task. Consultant(s) must provide hourly rates, and a total fee. Please note if you are offering a nonprofit discount to your normal fee structure. Additionally, please indicate how consultant would approach its fees if there should be subsequent work.

Fees will be paid on a monthly basis based on monthly time reports. Time during a week for particular tasks may vary from the above if a task takes more time in a given week, but overall time allocation budget for the task should not be exceeded. Consultant and Green Bank may re-allocate the times between with the tasks above with mutual agreement.

Consultant will report time (within 30-minute increments) for each date in which work on a task is conducted and briefly summarize the work for that task for that day. Consultant would use Salesforce to document efforts and identify follow-up needs on all opportunities. Consultant will have 30-minute calls once a week with the Green Bank to summarize effort and discuss any strategy adjustments. Consultant will submit the time report on a weekly basis prior to the weekly calls.

In its sole discretion, the Green Bank may increase the hours related to any Task and amend the contract with the Consultant for this increase based on agreement between the Green Bank and Consultant.

Consultant may bill for reasonable travel expenses for mileage with supporting expense form to support the activities of Task 1, 2, and 3.

**VIII. QUOTATION SUBMISSION INSTRUCTIONS**

**The deadline for all submissions is July 2, 2020. Consultant will be selected by mid-July, with anticipated contract signing immediately thereafter.**

The Green Bank requires a written letter proposal of no more than three (3) pages (not including resumes or descriptions of prior work included in attachments to proposal) to cover the following:

- 1) Consultant’s approach to undertaking the work described in the Task.

- 2) Consultants specific experience that supports undertaking work of the Task. (Any collateral material on past work experience should be provided as attachments to the proposal.)
- 3) Consultant's proposed bid, including Consultant's hourly rate.
- 4) Summary of consultant's overall qualifications for undertaking the work.

Proposals should be sent to: [RFP@mcgreenbank.org](mailto:RFP@mcgreenbank.org).

The Green Bank reserves the right to request additional information or clarifications from proposers, or to allow for corrections of errors or omissions. The Green Bank reserves the right to reject any or all proposals if necessary.

#### **IX. EVALUATION OF PROPOSALS**

The Green Bank will base its selection on several factors, including:

- Clarity of the response to the engagement and commitment to meet the needs and time of the assignment.
- Knowledge of the commercial energy efficiency and renewable energy sector.
- Knowledge of clean energy financing.
- Experience in outreach and marketing /sales.
- Skills in collaborating.
- Experience in undertaking work of a similar nature.
- Competitiveness of fees, especially in consideration of Green Bank being a 501(c)3 nonprofit.

The Green Bank may include an interview of respondents as part of the evaluation and decision process.

Please direct any questions to [RFP@mcgreenbank.org](mailto:RFP@mcgreenbank.org) or call 240-453-9000.