



**Solicitation Number: NASEO-2021-RFP-006**  
Financing Residential Energy Efficiency  
**Request for Proposals**

**Summary**

**Introduction:** The National Association of State Energy Officials (NASEO) seeks an expert consultant to inform our activities at the intersection of home energy labeling, energy efficiency financing, and federally-supported lending programs.<sup>1</sup>

**Contract Amount:** Not to exceed \$5,000.

**Project Period:** January 1, 2022 – March 31, 2022.

**Proposal Deadline:** Friday, January 7, 2021, at 5:00 p.m. ET.

**Potential Application Interviews:** NASEO may invite applicants to participate in a 30-minute phone interview to clarify and answer questions about their submission.

**Contract Selection:** Anticipated by Tuesday, January 18, 2021.

**Work To Be Completed:** The consultant will assist NASEO in identifying opportunities to integrate labeling options such as Home Energy Score with government and private-sector financing products.

**Submission and Point of Contract:** Applications and questions can be directed to Maddie Koewler, Buildings Program Manager, NASEO: [mkoewler@naseo.org](mailto:mkoewler@naseo.org), (571) 290-0040.

**Background**

NASEO<sup>2</sup> seeks a consultant to identify opportunities for Home Energy Score<sup>3</sup> and other labeling options to be integrated in financing products. Home energy labels document the energy assets

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<sup>1</sup> This request for Proposals does not obligate NASEO to award a contract. NASEO reserves the right to cancel all or part of this solicitation. All costs incurred in response to this Request are the responsibility of the respondent.

<sup>2</sup> NASEO is the only national non-profit association for the governor-designated energy officials from each of the 56 states, territories, and the District of Columbia. Formed by the states in 1986, NASEO facilitates peer learning among state energy officials, serves as a resource for and about State Energy Offices, and advocates the interests of the State Energy Offices to Congress and federal agencies. For more information, visit [www.naseo.org](http://www.naseo.org).

<sup>3</sup> Home Energy Score information is available at [www.homeenergyscore.gov](http://www.homeenergyscore.gov).

and energy performance of a home and can provide insight on home performance for occupants and for the financial community. The opportunity for home energy labels to provide value to the financial industry will be the focus on this work in support of NASEO's home energy labeling initiative. The consultant will assist NASEO in determining which home and energy financing products have potential for integration with Home Energy Score, specifically how a Home Energy Score can be leveraged to secure funding or financing for energy efficiency improvements. The consultant's knowledge of federal residential financing markets, including GSE affordable housing issues and regulations is important to leveraging NASEO's efforts in this area.

### **Contract Information**

The funds for this contract have been provided by DOE's Office of Energy Efficiency and Renewable Energy. The underlying agreement between DOE and NASEO will be incorporated in the subcontract between NASEO and the consultant. All requirements of the DOE contract shall be controlling, including, but not limited to, federal reporting and the propriety and form of expenses and costs. The contract shall be issued following approval from DOE and will become effective when signed and dated by both parties.

The consultant shall invoice monthly only for actual work completed. NASEO will reimburse the consultant for actual milestones achieved and hours spent in the execution of the work (not to exceed the total approved budget amount shown in the final contract agreement) once NASEO has received payment from DOE.

### **Expected Project Activities**

The consultant will be expected to execute the following activities:

1. Collaborate with NASEO to develop a memo detailing opportunities for Home Energy Score to be integrated in financing products prioritizing ways Home Energy Score results can be leveraged to secure financing or funding for energy efficiency improvements.
2. Participate in regular check-ins with NASEO to provide updates on progress and identify technical assistance needs. NASEO and the consultant will meet at least once per month.

### **Proposal Process**

All proposals must be received by **Friday, January 7, 2021, at 5:00 p.m. ET**. Please assemble responses to the above in one PDF document. Send it and the budget justification worksheet<sup>4</sup> to Maddie Koewler at [mkoewler@naseo.org](mailto:mkoewler@naseo.org). NASEO may conduct interviews to clarify application materials during the review process.

### **Proposal Requirements and Criteria**

The following is a summary of the required proposal content and scoring values assigned to each section for the selection process. Each proposal can receive up to 100 points. The proposal

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<sup>4</sup> The budget justification worksheet (download) is available at <https://eere-exchange.energy.gov/FileContent.aspx?FileID=9a7d131d-ca81-4b78-8fa5-c2488031ec83>

narrative should not exceed one page single-spaced, 11-point font, using Arial or Calibri font and 1-inch margins (excluding the cover sheet).

**Cover Sheet:** The cover sheet must include the name of the organization, its legal status (sole proprietor, etc.), Federal Tax ID Number or Tax-Exempt Number, as well as name, mailing address, telephone number, and email address of contact person authorized to answer questions and negotiate the contract for proposed services.

**References:** Provide three references that can attest to your organization's expertise on this topic. Include contact information for each reference and a short description of your relationship with them, including any past projects. References will not count against the page limit.

**Execution of Proposal (30 points):** Describe how your organization will execute the activities identified in the "Expected Project Activities" section and your ability to meet the deadlines described in that section. Respondents may also propose additional tasks or activities to improve program results.

**Relevant Topical Experience (20 points):** Describe your organization's experience with GSEs and other financial market stakeholders. Demonstrate knowledge of this field and key barriers to executing project activities along with plans to mitigate barriers, as necessary.

**Ability to Execute Proposal (20 points):** Identify key staff and your organization's unique ability to execute this work. Provide the name, title, and anticipated role of each team member. One-page biographies may be included in an appendix (not counting towards maximum page count) if relevant to the narrative.

**Responsiveness (10 points):** Degree of detail provided will determine points awarded for this category. Exceeding the page requirement for the proposal narrative will lower the respondent's score in this category.

**Cost and Budget (10 points):** A budget should be completed using the DOE EERE-335 budget justification spreadsheet which is a separate file available for download from DOE's website. If selected, this spreadsheet will need to be approved by DOE for the consultant to be added to NASEO's project as a subrecipient.