



**Request for Proposal for  
Community Outreach and Professional Services**

**Community Energy Resiliency Initiative  
Fundación Comunitaria de Puerto Rico  
April 2024**

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## I. COMMUNITY ENERGY RESILIENCY INITIATIVE OVERVIEW

The Puerto Rico Community Foundation (FCPR) hereby presents the Community Energy Resiliency Initiative (CERI), a program sponsored by Global Energy Alliance for People and Planet (GEAPP). The program's goal is to achieve environmental and clean renewable energy justice through the installation – in a two-year period – of solar systems in vital/critical facilities that are essentials for disaster resiliency and recovery. During this two-year period – known as the scalability phase – the aspiring goal is the installation of the systems on seventy-five (75) critical facilities.

To achieve this goal, CERI will generate a pipeline of community critical facilities (e.g., schools, pharmacies, grocery stores, non-profit organizations, etc.), which will receive blended financing – a mix of loan and grant funding – to purchase and install solar microgrids. CERI aims to provide comprehensive services and support to help address the barriers to access, including excessive costs, limited access to financing and lack of technical assistance.

Our target beneficiaries are critical facilities, that provide essential life services, emergency services and/or other goods and services to the community. These critical facilities will be able to provide key uninterrupted services or essential products in the aftermath of a natural event with catastrophic results and will allow these facilities an even-greater leadership role in relief and recovery efforts. They will also exemplify how communities can significantly contribute to the 2050 goal of a 100% renewable energy system in Puerto Rico. Local market conditions, particularly after the power blackouts in the aftermath of Hurricane Fiona, are suitable and promising to stimulate CERI's momentum and scalability.

## II. CERI SCALABILITY PHASE

CERI commits resources, experiences, and efforts to ensure that within two (2) years, 75 critical facilities receive blended financing (loan and grant) for the acquisition and installation of solar systems. The intention is that the critical facility can operate uninterruptedly while paying less for the system's financing compared to what they currently pay for electricity. The financing will consist, on average, of a loan covering 80% of the total cost of the solar system and a grant (subsidy) covering the remaining 20%.

The organizations involved in the management and operation of CERI are:

- **Global Energy Alliance for the People and the Planet (GEAPP).** Provide the funds to operate the project in Puerto Rico and to offer subsidies to critical facilities. They are responsible for the project's governance structure and are the ones who contract FCPR to act as the project management and grantmaking institution.
- **Fundación Comunitaria de Puerto Rico (FCPR).** In charge of project management and grantmaking. This includes identifying potential critical facilities, contracting installers, defining requesting necessary documents to determine the eligibility as critical facilities

according to the project’s definition, overseeing pre-design of the solar energy system using a techno-economic model, supporting organizations throughout the process, acting as a liaison between critical facilities and installers and the financial institution, and conducting the final inspection of the systems. The FCPR will offer financial support, in the form of grants, to increase the percentage of the subsidy as needed in the case of nonprofit organizations.

- **Banco Popular de Puerto Rico (the “Bank”).** Responsible for credit evaluation and approval of loans for the critical facilities and for disbursing the subsidy according to the techno-economic model and as recommended by FCPR. The bank will oversee making payments to the contractors according to the installation phases. BPPR will also provide a grant to FCPR to provide financial support, in the form of grants, to reduce the initial contribution of critical facilities – when they are nonprofit organizations – paying for expenses (i.e., legal, origination, interest reserve, and any other expense required prior to financing).
- **Critical Facilities (CF).** Provide essential life services, emergency services or economic services to their communities; support vulnerable or dependent populations; and/or provide for the continuation of public health and safety during a disaster while aiding recovery efforts and the continuity of government, business, and other services after a disaster. Also, facilities offering services within the following sectors are eligible for financing through CERI: healthcare, social services, infrastructure services, communications, food services and transportation.
- **Engineering, Procurement and Construction Contractors (EPC).** Certified renewable solar energy installers with experience, licenses, certifications, and authorization to perform solar energy installations in Puerto Rico.

### III. HIGH LEVEL CERI WORK PROCESS FLOW

CERI activities have been designed to build an effective and efficient critical customer relationship and service pipeline, that will also include technical assistance and support. These activities allow for a consistent monitoring and evaluation to ascertain general and individual progress, to timely identify challenges and potential shortcomings, and to react accordingly through troubleshooting strategies and appropriate adjustments and modifications, as necessary, and within an ethos of continuous improvement. Enclosed as **Attachment #1** is a high-level sequential workflow, while the accompanying **Table 1** delineates a series of principal activities.

**Commented [MG1]:** Revisar el workflow que envié y sustituir.

**Commented [MG2]:** Revisar el workflow que envié y ajustar en la tabla.

**Table 1**

| # | Activity  |
|---|---|
| 1 | <b>Outreach &amp; Engagement:</b> contact the CF; provide an informational session; conduct a site visit; request initial documentation.  |
| 2 | <b>Technical:</b> analyze electric bill, financial information and other data provided by the CF; perform a techno economic analysis; determine preliminary system size and capability, cost, and quantity of subsidy needed. |
| 3 | <b>Programmatic Eligibility:</b> provide technical information to the CF and validate eligibility based on CF interest, and CERI investment parameters.   |
| 4 | <b>Guidance &amp; Support:</b> assess and confirm technical specs (obtain from the EPC); support CF in applying for the loan; work with CF to complete the loan application.  |
| 5 | <b>Approval:</b> coordinate and provide support to EPC and CF to obtain documents for disbursement of loan and subsidy if the bank approves the loan application.   |
| 6 | <b>Installation:</b> oversee of project installation by EPC's.  |
| 7 | <b>Inspection:</b> carry-out an installation inspection and sign-off.   |
| 8 | <b>Reporting:</b> provide a report of the project closed; provide quarterly reports as required by GEAPP.   |

#### IV. SCOPE OF SERVICES

FCPR is releasing this Request for Proposals (RFP) to identify and engage knowledgeable and highly efficient non-profit organizations and/or professional firms that can support FCPR in the project management role by providing Community Outreach and Engineering and Certification professional services for the implementation and reporting of CERI in Puerto Rico. Respondents are expected to have in their core belief that they can be an uplifting component of Puerto Rico's renewable energy infrastructure and are willing to join this philanthropic venture by submitting their credentials and proposal. The scope of services requested are:

**A. COMMUNITY OUTREACH AND PROFESSIONAL SERVICES.** Community outreach services play a crucial role in the successful implementation of the Community Energy Resilience Initiative (CERI). These services encompass a comprehensive approach to ensure the active participation of critical facilities. Initially, the process involves promoting CERI to potential critical facilities and Community-Based Organizations (CBOs) interested in participating. Subsequent steps include making phone calls to these facilities to assess their general eligibility and providing them with an in-depth informational session about CERI (including benefits, processes), and the necessary eligibility data and documents to apply for the loan/ subsidy/ grant mix. A Memorandum of Understanding (MOU) is then signed to formalize participation, followed by a site visit for data and document gathering, including power bill collection and facility observation.

The engagement process further extends to executing a technoeconomic assessment (See Subsection D – Engineering). This assessment aims to determine preliminary system size, capabilities, associated costs, and the required subsidy amount. Eligibility validation is

performed with the technical information of the critical facilities and assessing eligibility based on the candidate's interest and investment parameters of CERI. The process also involves determining the estimated system cost by selecting an Engineering, Procurement, and Construction (EPC) partner and requesting a solar system quote, ensuring the selection strategy is effectively implemented.

Additionally, the service includes calculating the subsidy required for each facility, facilitating the loan application process, and offering ongoing support throughout the loan approval process. This comprehensive support ensures that critical facilities are well-informed and assisted in preparing the preliminary application package, coordinating with EPC and financial institutions to secure necessary documentation for the disbursement of loans and subsidies. This holistic approach to community outreach and engagement is pivotal in fostering participation, ensuring eligibility, and facilitating the financial aspects of implementing resilient energy solutions within critical facilities.

**Important Note:** *The human resources assigned to the project must possess thorough proficiency in English, with the ability to speak, write, conduct meetings, and make presentations fluently in the language.*

**B. REPORTING.** The selected proponent must adhere strictly to the reporting data previously established by GEAPP. This adherence is essential to ensure consistency in performance measurement and to facilitate a seamless flow of information. The reports should align with the FCPR's specified formats, metrics, and frequencies, capturing all critical data points and insights as defined in the agreement. Such disciplined compliance with FCPR's reporting criteria not only fosters transparency and trust but also guarantees that FCPR can track the project's progress against strategic objectives and make data-driven decisions. The selected company must integrate these reporting variables into their routine processes, thus ensuring that every aspect of the project's performance is systematically monitored, evaluated, and communicated in alignment with expectations and requirements agreed upon. The reporting will include the collection and dissemination of key performance indicators related to access to sustainable and resilient energy sources, climate impact, job creation, critical facilities equipped with solar and battery systems, the allocation of funds within a predetermined timeframe, the capacity utilization rate of the systems, other capital invested, and the number of loans provided (fixed debt and subsidy). These metrics will be reported on a quarterly basis.

**C. CUSTOMIZED CASE MANAGEMENT SYSTEM.** The selected company must design and implement a tailored methodology and technology which encompasses systematic record-keeping, case tracking, and reporting mechanisms. This customized system must be robust and flexible enough to meet the specific needs of the project, integrating tools that facilitate efficient workflow management, documentation control, and real-time tracking of project activities and milestones. It should also provide a coherent framework for capturing the nuances of the project and ensuring that information is accurately recorded and easily retrievable for analysis. Furthermore, the firm must ensure that this system supports the generation of detailed reports, providing critical insights into project performance, resource

allocation, and progress toward deliverables, thereby enabling informed decision-making throughout the project lifecycle.

**D. ENGINEERING.** The services requested by CERI in this RFP encompass a series of engineering tasks, beginning with a preliminary site visit and review. This initial phase is critical, as it sets the foundation for the project’s design parameters and feasibility. Following this, a detailed preliminary design and technoeconomic analysis are undertaken, ensuring that all projects are both technically viable and economically sound. Project accuracy is further refined by reviewing EPC quotes, providing expert advice on the technical specifications of agreements, and maintaining rigorous oversight through regular site visits. The culmination of these phases is the final inspection, ensuring all aspects of the project align with the highest standards of quality and precision.

Recognizing the specialized nature of these services, the selected proponent retains the right to subcontract an engineering firm to execute the tasks. It is imperative that any such subcontracted firm or individual engineer not only holds a valid license in the Commonwealth of Puerto Rico but also possesses a photovoltaic certification, upholding the company's commitment to compliance and professional integrity.

All outsourced professional services will have as a point of contact a FCPR Program Officer.

## V. ELIGIBLE PROPONENTS

Eligible proponents are experienced non-profits, corporations, companies, or firms or professionals with experience in performing community outreach and professional services, preferably in the solar renewable energy industry.

## VI. SITE LOCATIONS

The selected critical facilities will be seventy-five (75). The critical facilities are distributed island wide and it is expected that the proponent’s staff are willing to engage in constant travel to meet project demands.

## VII. INSTALLERS (“EPC”)

A selection of seven (7) EPC contractors has been made by FCPR through a Request for Qualifications process that took place during the fourth quarter of 2023. These EPC will be available to install the goal amount of 75 critical solar sites.

## VIII. CONTRACT TERM

The contract term for the services procured in this RFP will be 12 months, with the expectation of renewing for at least an additional 12 months if FCPR understands that the selected proponent

has met the metrics, deliverables, reports, and the quality of service expected. FCPR reserves the right to extend the contract for additional months at its discretion, and there is no guarantee that the selected proponent will be contracted for more time beyond the initial term.

## IX. PAYMENTS AND SCHEDULE OF PAYMENTS

These will be by agreement between the parties. The proponent is required to exhibit financial stability as a qualification criterion. Additionally, the party must possess the financial strength necessary to accommodate a payment collection period of 30 to 45 days post-invoicing.

## X. INVOICING

From the agreed payment schedule, invoices must: (1) have an invoice number; (2) be addressed to the company; (3) detail the services offered (such as deliverables, reports, outcomes); and (4) contain the achieved metrics. Other details about the invoicing will be provided in the contract.

## XI. FCPR CONTACT INFORMATION AND RFP TIMELINE

**Contact Email:** [accesoenergia@fcpr.org](mailto:accesoenergia@fcpr.org) / **Phone No.:** (787) 721-1037

### RFP Timeline:

| Event   | Date           |
|---|----------------|
| FCPR RFP Announcement Made Public                             | April 24, 2024 |
| Proponent's Deadline to Submit Questions according to the RFP | May 8, 2024    |
| FCPR Submits Responses to Questions from Proponents           | May 22, 2024   |
| Contractors Qualifications Submission Deadline                | June 10, 2024  |
| FCPR Announce Decision to all potential Proponents            | June 19, 2024  |

**Certification of Non-Conflict of Interest.** By responding to the RFP, the proponent affirms that no member of the Board of Directors or Executives of their entity or FCPR has a stake in or stands to gain from the revenues, profits, or advantages derived from the proposal, and will promptly disclose any potential conflicts of interest or abstain from responding if any are identified.

**Confidentiality and Rules of Contact.** The proposer agrees to uphold the confidentiality of the details pertaining to the CERI project during the RFP process and commits to following designated communication protocols that preserve the integrity of the procurement procedure. It is understood that official communications regarding the RFP will be issued exclusively through the email provided by FCPR ([accesoenergia@fcpr.org](mailto:accesoenergia@fcpr.org)), beginning with the publication of the RFP availability via a public notice. The proposer is to refrain from engaging in discussions about the

qualification process with their peers’ entities, and all questions and correspondence must be channeled exclusively through the specified email, acknowledging that any verbal exchanges are informal and not legally binding. All formal interactions will be executed via email. Any interaction deemed inappropriate by the FCPR may result in the proposer’s disqualification, and those found participating in unauthorized discussions may be disqualified at the discretion of the FCPR.

## XII. REQUEST FOR PROPOSAL PROCEDURES

The proponent proposal must be received at Fundación Comunitaria de Puerto Rico offices, no later than close of business (5:00 p.m.) of **Monday, June 10, 2024**.

Any questions should be submitted in writing through email to: [accesoenergia@fcpr.org](mailto:accesoenergia@fcpr.org) no later than **Wednesday, May 8, 2024**, at close of business (5:00 pm). The questions may be submitted in English or Spanish identifying the proposer’s name and email address. Each proposer may submit more than one question in the following format:

| Proponent [INSERT NAME] Questions for Community Energy Resiliency Initiative (CERI) |             |          |
|---|-------------|----------|
| Question No.  | RFP Section | Question |
| 1.  |             |          |

Contractors should expect seven calendar days to receive feedback. Responses to questions will be sent to all proponents under this RFP by **Wednesday, May 22, 2024**. Contractor’s name will be kept anonymous. Responses shall not be construed as in any way amending, modifying, or altering the meaning and intent of this RFP, unless the RFP is amended by the FCPR.

Proposals must conform to specified formatting guidelines for consistency and easy comparison:

- Proposals must be typed on standard 8 ½” x 11” paper, with one-inch margins and 1.5 line spacing for the main text.
- For charts, diagrams, and spreadsheets, the use of larger paper sizes (up to 11” x 17”) and smaller font sizes is allowed.
- All proposal documentation, including exhibits, must be written in English, except for certifications and/or documents issued by the Government of Puerto Rico, which may be in Spanish.

All proposals must adhere to the section order as specified in the provided information.

1. Cover Letter
2. Proposal
  - a. Qualifications (experience, past performance, commitment to nonprofit sector, transparency)
  - b. Work Approach (services, engineering services, staffing and resources, technology and reporting, and supervision and communication with FCPR)
  - c. Budget
  - d. Financial Stability
3. Certifications and Licenses
4. Letter of Intent or MOU (as applicable) from the engineer or engineering firm

5. Letters of Reference
6. *Certificado de Incorporación*
7. Certificate of Good Standing
8. Employee Identification Number
9. *Registro de Comerciantes*
10. Others

### XIII. PROPOSAL CONTENT AND EVALUATION

**A. MANDATORY REQUIREMENTS.** Proponents must meet the basic eligibility criteria as stipulated in Section V (Eligible Proponent) of this RFP. This is a preliminary screening to ensure the proponent has the necessary legal and professional standing to undertake the project. Also, proponent must demonstrate financial strength as well as good standing with the Commonwealth of Puerto Rico. See the table below for the mandatory evaluation criteria. Strict compliance with this information/documents is required.

**Table 1:** Mandatory Requirements

| # | Content   | Pass                     | Fail                     |
|---|---|--------------------------|--------------------------|
| 1 | The proponent is a non-profit, corporation, company, or firm, or is a professional, with the following evidence: <i>Certificado de Incorporación (as applicable)</i> , <i>Certificado de Good Standing</i> , Employee Identification Number (as applicable) and <i>Registro de Comerciantes</i> .             | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | The proponent demonstrates the capability to provide engineering services through either in-house staff or through a letter of intent (or memorandum of understanding) with a subcontracted firm that have a licensed engineer by the Commonwealth of Puerto Rico and possesses a photovoltaic certification. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | Proof that the proponent possesses the financial strength necessary to sustain operations for a minimum of three months during any potential delays in payment from the time of the first invoice.  | <input type="checkbox"/> | <input type="checkbox"/> |

### B. EVALUATION FACTORS

#### 1. QUALIFICATIONS [30 Maximum Points in this Section]:

The following are the evaluation factors along with their relative value, which will serve as the criteria for assessing the merits of each proposal submitted:

**EXPERIENCE (15 points):** Proponent's history in providing services to similar projects, particularly in the solar renewable energy industry.

**PAST PERFORMANCE (5 points):** Documented evidence of successfully completed projects, including timeliness, adherence to budget, and client satisfaction. Please, provide letters of reference from two commercial clients for whom you have provided project management services within the previous twelve months.

**COMMITMENT TO THE NONPROFIT SECTOR (5 points):** Demonstrated understanding and experience in working with nonprofit organizations, aligning with their values and objectives, including a current Corporate Social Responsibility program and strategic approach.

**TRANSPARENCY (5 points):** Willingness and track record of maintaining open and transparent communication channels throughout previous project executions.

## 2. WORK APPROACH [50 Maximum Points in this Section]:

**COMMUNITY OUTREACH AND ENGAGEMENT (25 points):** A comprehensive plan designed to address the objectives of CERl must incorporate a multifaceted strategy that encompasses community outreach and engagement. Such a program should lay out a clear pathway for securing hybrid financing, ensuring that within two years, 75 critical facilities are equipped with solar systems through an 80% loan and 20% grant funding model. The program should include processes for identifying eligible facilities, conducting technoeconomic assessments, and managing the installation of solar systems. Additionally, it should specify a framework for collaboration between the critical facilities, financial institutions, and EPC contractors, with an emphasis on supporting nonprofit organizations and ensuring the sustainability and resilience of essential services. Robust mechanisms for oversight, such as regular reporting and final inspections, must be embedded to maintain high standards and transparency throughout the program's lifecycle.

**ENGINEERING SERVICES (10 points):** The engineering tasks cover initial site evaluation and preliminary review, design and technoeconomic analysis, review of contractor quotes, ongoing expert oversight including advise on technical specs of EPC agreements, site visits and final inspection of the installation. Submit letters of reference from two commercial clients to whom the engineer has provided project management services within the preceding twelve months.

**STAFFING AND RESOURCES (5 points):** The company must submit an organizational chart and detail the qualifications of the staff proposed to be dedicated to the project.

**TECHNOLOGY AND REPORTING (10 points):** Evaluation of the proponent's reporting approach will focus on the clarity and sophistication of software, applications, or tools designed specifically for: (1) tracking and document management of each critical facility; (2) reporting (i.e. dashboard); and (3) sharing of documents and information with the GEAPP and the Bank.

## 3. BUDGET [15 Maximum Points in this Section]:

A comprehensive budget proposal is required outlining the anticipated work approach and activities, demonstrating cost-effectiveness and economies of scale where applicable for the two-year program period. Also, please provide a detailed explanation of how you will manage and control the budget throughout the project's duration.

#### **4. FINANCIAL STABILITY [5 Maximum Points in this Section]:**

Demonstrate that the proponent possesses the financial strength necessary to sustain operations for a minimum of three months during any potential delays in payment from the time of the first invoice.

This rubric provides a framework for assessing the proponents' proposals, with a strong emphasis on their work approach and methodology, reflecting the importance of these aspects in the successful delivery of the project. Each section will be evaluated according to the specified criteria, and the proponent achieving the highest cumulative score will be selected.

FCPR reserves the right to either select a proponent, regardless of whether only one responds to the RFP, or to refrain from selecting any, irrespective of the number of respondents.

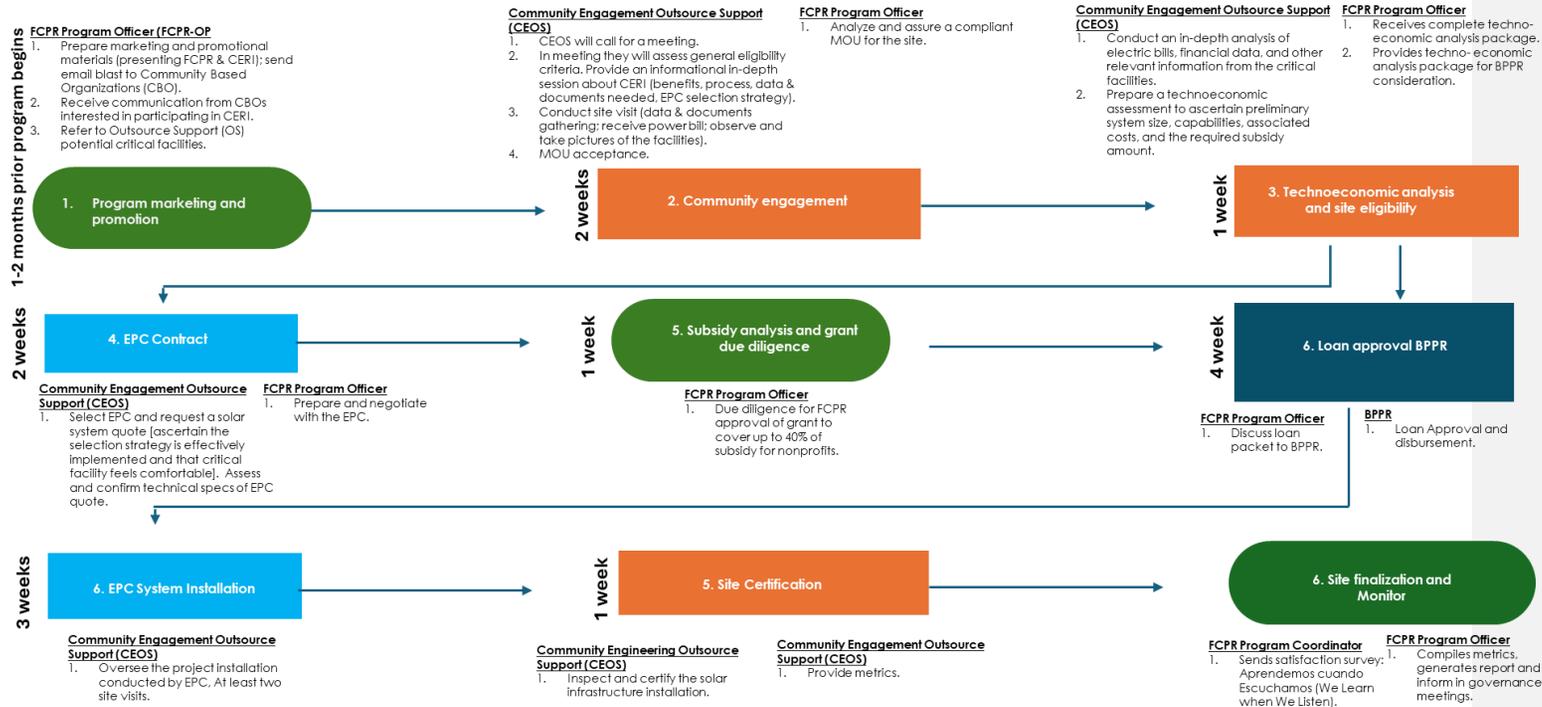
## ATTACHMENT 1: HIGH-LEVEL SEQUENTIAL WORKFLOW

**CERI Process**

The process focuses on one single case.

The overall estimated time is 16 weeks per case.

We should be able to work on 12 cases at a time, the projection is 36 cases annually (goal), for a total of 72 cases in two years (goal).



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