

Request for Proposals: Partner for Whole Homes, Whole Community Initiative

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I. Introduction

Background: The Detroit Area Advocacy Organizations (Soulardarity and We Want Green Too) or DAAO and the Clean Energy Organizations (Union of Concerned Scientists, Ecology Center, Environmental Law and Policy Center, and Vote Solar) or CEO are **seeking a qualified and experienced partner to oversee the management, disbursement, and evaluation of \$8 million** in settlement funds related to DTE Energy’s 2022 Integrated Resource Plan. The settlement contains these guidelines below:

“\$8 million (\$2 million in February 2024, \$2 million in Q1 2025, \$2 million in 2026, and \$2 million in 2027) will be donated to an organization(s) that assist Michigan low-income customers with the installation of energy efficiency improvements, renewable energy, or battery technology, including necessary home repairs to facilitate the installations, as determined through consultation with DAAO, the CEOs, the Attorney General, and the Staff. In the event the parties cannot reach unanimous agreement on the recipient organization(s), the funds shall be donated to an intermediary, determined by majority vote of the five named parties, not affiliated or funded by DTE Energy Company (DTE) or any of its subsidiaries that will disperse the funds for their intended use in consultation with the parties.”

These funds are intended to support the vision of We Want Green, Too and Soulardarity, which are grassroots organizations seeking collaborative partners to assist in advancing our community clean energy program called "Whole Homes, Whole Community".

Program Mission Statement: Our mission is to empower and uplift the underserved communities of Highland Park and East Detroit, Michigan by delivering essential home repairs, improvements, and investments in efficiency, clean energy, and storage to create a transformative impact. Rooted in community engagement, Whole Homes, Whole Community is crafted to bring communities, advocates, industry, and state agencies together to build just and equitable energy solutions. To prevent further fossil fuel investment and financial extraction, we need to build renewable power and provide energy efficiency quickly. This development must generate jobs, savings, and development for frontline communities to achieve an energy transition that is accessible and transformative for everyone. With this shared commitment, we can leverage state, federal, and philanthropic funding to expand upon the settlement funds secured by DAAO and CEO's intervention to provide solar, storage, and healthy homes for all.

In addition to a partner, we are welcoming responses from other interested parties as outlined in Section V. Invitation For Interested Party Responses.

II. Partner Scope of Work

- A. Funds management: Safeguarding and managing the \$8 million in settlement funds, ensuring transparency, accuracy, and compliance with GAAP and all relevant financial regulations. This scope includes a clear process for cash flow and regular financial reports to DAAO, CEO and other key stakeholders as requested detailing fund transactions, balances, and any relevant financial information.
- B. Disbursement and Contracting: Establishing contracts and disbursing funds to the implementing contractors in accordance with contract terms, and ensuring that funds are utilized properly in support of the "Whole Homes, Whole Community" initiative.
- C. Research and writing grants: Researching available private and public (state and federal) grants and incentives to obtain additional funds for the Whole Homes, Whole Community program and creation of a business plan to secure funds.
- D. Stakeholder engagement: Collaborating with the DAAO and community stakeholders to ensure that the disbursement of funds aligns with the community's needs and values.
- E. Audit and Compliance: Coordinating with external auditors to conduct periodic audits of fund management and ensuring compliance with all legal financial regulations as well as have documentation to support said ability and meet compliance with agreed-upon procedures
- F. Documentation and Record Keeping: Maintaining thorough and accurate records of all financial transactions and documentation related to the initiative.
- G. Data Collection: Gathering quantitative and qualitative data on financial and quality of life to demonstrate progress and impact of "Whole Homes, Whole Community" program, establishing consent of program participants, and developing and enforcing data storage and usage protocols for protection of participant privacy
- H. Community Involvement: Ensuring with DAAO that community input and alignment with community values is a top priority through robust outreach, engagement, and continuous communication to the target communities.

- I. Program Design & Implementation: Working with DAAO to complete a rigorous planning phase (see Exhibit A), develop a detailed program design, goals, and budget, and manage the fiscal, contractual, and reporting relationships required to achieve the intended outcomes.

III. Proposal Components

Proposals should be organized into the four sections outlined in this portion of the RFP. Applicants are encouraged to review the scoring criteria in Section V. RFP Evaluation Process to ensure that your proposal addresses all scoring criteria.

A. *Organizational Background*

This proposal component should outline the capacities and experiences your organization brings to the Whole Homes, Whole Community program.

Capacity and Resources:

- What is the capacity of your organization to handle a project of this scale and complexity?
- Please provide information on the size and expertise of the team that will be dedicated to managing the "Whole Homes, Whole Community" initiative
- Please provide an organizational chart or similar resource outlining the key staff responsible for different program components and how they interact. If external contractors are used, describe how they are managed to complete projects.

Risk Management:

- What strategies do you have in place to identify and mitigate potential risks associated with fund management, disbursement, and project implementation?
- Provide evidence of liability insurance that will adequately cover damages in the event that some portion of the project negatively impacts a homeowner.
- How do you handle unexpected changes or challenges in project execution?
- Provide a copy of your organizational financial control processes. Please also discuss your experience utilizing these processes and how they have been deployed on past projects.

Diversity, Equity, and Inclusion (DEI) and Values alignment:

- How does your organization incorporate principles of diversity, equity, and inclusion in its operations and project management?
- Share any specific DEI initiatives or practices within your organization.
- Does your organization utilize or have familiarity with the [Jemez](#), [Environmental Justice](#), [Nguzo Saba](#), or [Just Transition](#) Principles? Describe any guiding documents or practices you have that utilize or align with these principles.

Technology and Data Utilization:

- Describe your organization's capabilities in utilizing technology for data collection, analysis, and reporting.

- How do you plan to leverage technology to enhance the efficiency and effectiveness of the "Whole Homes, Whole Community" initiative?

Grant Writing:

- Provide examples of successful grant writing and outline plans or strategies on accessing federal or state grants available for this RFP's directive.

B. General Programmatic Approach

This proposal component should outline the specific approach to the Whole Homes, Whole Community program as outlined in Exhibit A.

Collaborative Approach:

- How does your organization plan to collaborate with the DAAO, CEO, and other stakeholders throughout the project's lifecycle?
- Describe a previous instance where your organization successfully collaborated with community-based organizations.
- Describe your relevant experience working with marginalized communities.
- Describe how you would design and implement this program in partnership with DAAO?

Community Engagement Strategies:

- Provide details on your approach to community engagement and how you plan to incorporate community input into decision-making processes.
- Can you share examples from past projects where community engagement significantly influenced the project's success?

Innovation and Added Value:

- How does your organization plan to bring innovation and added value to the "Whole Homes, Whole Community" initiative?
- Provide examples of innovative approaches or solutions your organization has implemented in similar projects.

Training and Capacity Building:

- Outline any plans or strategies to build the capacity of the DAAO and the community in implementing and sustaining clean energy initiatives.
- Describe a time that you assembled funds from several sources in order to implement a project.

Long-Term Sustainability:

- How does your proposed approach contribute to the sustainability of the "Whole Homes, Whole Community" program over the entire funding period (4 years)?
- Share insights into your organization's commitment to leaving a lasting impact on the communities you serve.

Measurable Outcomes:

- How does your organization propose to measure and track the outcomes and impacts of the initiative, both in terms of financial disbursement and community benefits?

- Provide examples of key performance indicators (KPIs) used in similar projects.

C. Planning Phase Proposal

As outlined in detail in Exhibit A, we envision a six to eight-month planning period following the first disbursement, consisting of the following scopes:

Scope 1: Community Engagement

This scope includes canvassing the entire target neighborhoods, surveying, and holding focus groups and education events to inform the development of the design and branding of the program. The outcomes of this work will be community awareness of the program, building contact lists for households to target for implementation, and support the finalization of program design.

Scope 2: Research and Analysis

This scope includes analyzing public demographic and housing stock characteristics data, designing and analyzing results of a home survey, analyzing the results of energy audits, and developing a plan for program impact data gathering and analysis. This likely includes retaining a group with expertise and infrastructure for this kind of analysis.

Scope 3: Program Design and Funding

This scope includes conducting around 200 energy audits, analyzing workforce needs and opportunities for workforce development, designing the contractual and operational plan for program implementation, developing a full budget based on the insights from other scopes, identifying additional funding and programs to leverage, and securing those funds.

Applicant should provide a detailed outline of the planning period, including the following:

- A detailed budget for planning phase activities. Reports on spend (who, how much, what for) will be expected on a quarterly basis
- A realistic work plan and timeline

At the end of the planning period, applicant will be expected to develop and submit a complete program plan including:

- Total budget including all leveraged funds and incentives, identify which are secured and which are projected at the end of the planning period
- Selection criteria for households to be served by the program
- A detailed set of impact metrics including goals for:
 - Number of households served
 - Projected measures to implement in each household
 - Financial and quality of life success measures
 - Community-based workforce and business development outcomes
- A multi-year work plan outlining:
 - Continuous community engagement and education
 - Intake, education, and follow up with participants
 - Timely selection, payment, and effective management of contractors

- Reporting plan, including at minimum quarterly reports on program revenue and expenditures and achievement of program metrics

D. Supplemental Materials (optional)

Proposals should demonstrate a willingness to have a hands-on collaborative approach with respect to agreed upon roles. Applicants are welcomed and encouraged to include partners additional to the prime applicant who provide important skills, experience, and capacity to the overall proposal. Should applicants choose to do so, they should provide letters of support from said organizations indicating their willingness to participate. Applicants may also provide samples of prior work, testimonials, or other helpful background information for evaluation of your proposal.

IV. RFP Evaluation Process

A. General Criteria

This section of the RFP identifies applicant qualities which demonstrate alignment with the core team's values and the required skills and experience. A successful proposal will show:

- Track record of positive relationships and experiences with marginalized communities.
- Track record of integrity and transparency.
- Knowledge and track record of applying for and receiving federal (including IRA and IIJA), state, local, public and private grants and tax credits to maximize funding and value to households.
- Practices which demonstrate alignment with the [Jemez](#), [Environmental Justice](#), [Nguzo Saba](#), and [Just Transition](#) Principles
- Transparency and accountability in financial management and reporting.
- Experience working in the clean energy and energy waste reduction sectors.

B. Scoring

To make the RFP description, criteria, and scoring rubric more comprehensive and emphasize the importance of values alignment, we will score the following elements:

Criteria 1: Values Alignment (Score 0-5)

- 0: No evidence of alignment with the RFP's values and principles.
- 1-2: Limited alignment, with vague or unclear connections to values.
- 3-4: Moderate alignment with the organization's values and principles.
- 5: Strong and comprehensive alignment with a clear demonstration of how the proposal embodies these values.

Criteria 2: Qualifications and Experience (Score 0-5)

- 0: Lack of qualifications and experience relevant to the organization's values and principles.
- 1-2: Limited qualifications and experience, with minimal relevance to values.
- 3-4: Moderate qualifications and experience with some relevance to values.
- 5: Highly qualified and experienced, with a strong connection to the organization's values.

Criteria 3: Proposed Approach and Methodology (Score 0-5)

- 0: Proposed approach lacks alignment with the organization's values and principles.
- 1-2: Weak or unclear alignment with values.
- 3-4: Adequate alignment with values and clear methodology.
- 5: Comprehensive and well-defined approach in alignment with the organization's values.

Criteria 4: Stakeholder and Community Engagement (Score 0-5)

- 0: No evidence of alignment with community values and needs.
- 1-2: Weak or insufficient alignment with community values.
- 3-4: Adequate alignment with community values but could be improved.
- 5: Comprehensive alignment with community values and well-structured plans for effective engagement.

Criteria 5: Innovation and Added Value (Score 0-5)

- 0: Lacks innovation and added value in relation to the organization's values.
- 1-2: Minimal innovation or added value with respect to values.
- 3-4: Some innovation and added value that aligns with the organization's values.
- 5: Demonstrates significant innovation and added value in perfect alignment with the organization's values.

Overall Score Guide (Score 0-25)

- 0-7: Unacceptable proposal with severe misalignment with values.
- 8-14: Weak proposal with major misalignment with values.
- 15-17: Acceptable proposal with some alignment but significant room for improvement.
- 18-20: Strong proposal with exemplary alignment with DAAO's values.
- 21-25: Above and beyond proposal with very strong alignment and enthusiasm to work closely with DAAO including sharing resources and tools to nature the success of the program.

V. Invitation for Interested Party Responses

For parties who do not believe they are a fit for the partner role but desire to be involved in the Whole Homes, Whole Community program, we welcome expressions of interest from any entity which seeks to be engaged in the program. These may include community-based organizations, businesses, or government agencies who desire to offer resources or provide services to the programs. These responses should provide some organizational background, the resource or service being offered, and any relevant information for the stakeholder team to consider during the planning period. Responses should be submitted according to the RFP Timeline outlined in Section VI below.

VI. RFP Timeline

Interested parties should submit their proposals in accordance with the submission guidelines provided in the RFP document. The deadline for proposal submissions is January 19, 2024.

The CEO and DAAO will host a virtual information session for the RFP at the following time

Wednesday December 20, 2023

1pm-2pm EST

Register and RSVP at this link:

<https://us02web.zoom.us/j/84128761228?pwd=c0QrdGJyZ0xHd2xQeFVKNjk5YnhWUT09>

DAAO and CEO intend to work with the full stakeholder group including the AG, MPSC, and DTE to review, score, and respond to proposals promptly. We aim to come to a consensus on a partner no later than February 9, 2024.

VII. Contact Information

For inquiries or to obtain the complete RFP document, please contact info@hpdetroitwholehomes.org.

The DAAO and CEO looks forward to receiving qualified proposals from experienced fiduciaries who can support the "Whole Homes, Whole Community" initiative while upholding the Jemez, Environmental Justice, Nguzo Saba, and Just Transition principles.

VIII. Exhibits

Continued on following page.

EXHIBIT A:

Program Vision for U-21193 Settlement Funds

*Developed by the CEO and DAAO Parties
November 2023*

The Detroit Area Advocacy Organizations (Soulardarity and We Want Green Too) or DAAO and the Clean Energy Organizations (Union of Concerned Scientists, Ecology Center, Environmental Law and Policy Center, and Vote Solar) or CEO worked closely throughout the 2023 negotiations that led to the settlement of DTE Energy's Integrated Resource Plan. Included in the [settlement](#) was the commitment of \$8 million in donation over four years to a non-profit providing "energy efficiency improvements, renewable energy, or battery technology, including necessary home repairs to facilitate the installations" to low-income households.

Since the settlement was approved, DAAO and CEO have been working to prepare for the first \$2 million distribution, scheduled for February of 2024. That process has included discussions with the Michigan Public Service Commission (MPSC) Staff and the Attorney General's (AG) staff who will sign off on the allocation of the funding along with DTE. This document outlines the consensus developed between DAAO and CEO which was discussed with and assented to by MPSC, AG, and DTE prior to the creation of the RFP.

At this initial phase, DAAO and CEO focus their proposal on two key elements of the program which will ensure long-term success: a strategic geographic focus and a whole homes approach.

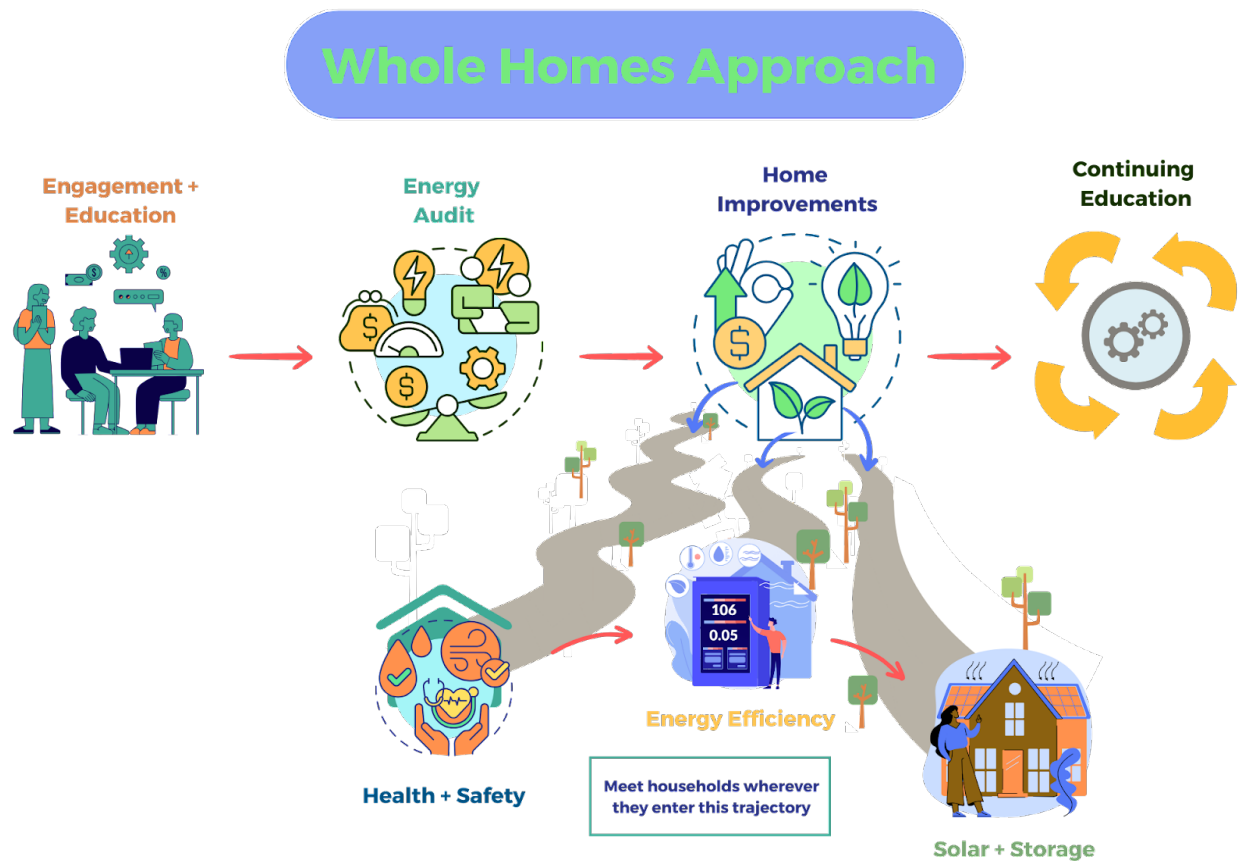
Geographic focus

DAAO and CEO propose focusing geographically on the home communities of the DAAO organizations - [Highland Park](#) and [Eastside Detroit](#) (48214) - which collectively have roughly 14,000 households. Even if leveraged many times over, this amount of funding is not sufficient to demonstrate impact across the service territory, or even the entirety of these two communities. Through the planning phase discussed below, we will identify a target number of homes, improvement measures required, and leveraged funding sources to achieve a meaningful level of local impact on energy burden and technology access.

For the purposes of a pilot program intended to generate learnings to expand access more widely, these focus areas make sense for several reasons:

- Community partnerships between DAAO and CEO organizations and a wide variety of other community, non-profit, business, and anchor institution partners will facilitate effective programming.
- Both communities meet conditions of high rates of energy poverty, high cumulative impacts, aging energy infrastructure, and aging housing stock. ([MiEJScreen](#))
- Research partnerships between DAAO organizations and UCS, NREL, and University of Michigan have already generated a wealth of data to aid in program design.

Whole Homes Approach



Program design must be rooted in the realities of households' most immediate concerns, while unwaveringly committing to bringing solar and storage solutions to as many homes as we can. Our focus remains steadfast on empowering communities with the resilience and economic benefits that come with sustainable energy choices.

The program should leverage existing state and utility programs. For example, a participating household that receives certain weatherization services from DTE or a social service agency may get critical home repair, additional weatherization, then solar and storage from the program. Alternatively, a household that has already completed critical home repairs and energy efficiency under its own stream or through other programs may join this program solely to get solar and storage. In all cases, households should be targeted on the basis of limited financial ability to undertake these improvements on their own.

Developing a complete program budget and leveraging plan that integrates all available programs and sources of funding for various components of household improvement will be a significant task. It is generally understood by organizations on the ground that the old housing stock occupied by low-income residents in Highland Park and Detroit has substantial repair and health and safety challenges which require intervention in order to implement beneficial solar

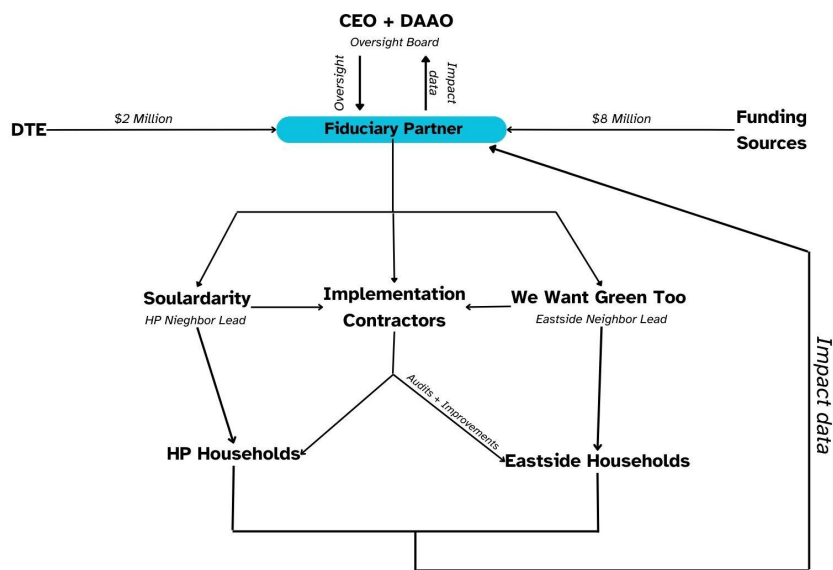
and storage. This pilot will build from those understandings and aim to demonstrate what is possible when programs are rooted in self-determination, education, and access for the communities they target and aim to holistically address household needs.

RFP and Phase 1 Implementation

With these principles in mind, DAAO and CEO propose the following process for advancing towards the initial funding distribution in February of 2024 and the initial phases of program implementation.

RFP Process For Partner

CEO and DAAO will initiate and manage a public RFP process to solicit a partner or partners to receive and manage the funds from DTE and maintain overall responsibility for their expenditure. The RFP draft and selection metrics will be shared with and updated by MPSC, AG, and DTE for input prior to release. CEO and DAAO will manage the process of soliciting and evaluating responses and then present a recommendation for the grantee to all settlement stakeholders with the rationale and supporting documentation for the decision.



Phase 1: Engagement, Analysis, Design + Funding

For this program to achieve maximum impact, a robust planning phase is required consisting of three major scopes. We anticipate this phase to take approximately six to eight months from the first funding distribution, with actual home upgrades beginning thereafter.

Scope 1: Community Engagement

This scope includes canvassing the entire target neighborhoods, surveying, and holding focus groups and education events to inform the development of the design and branding of the program. The outcomes of this work will be community awareness of the program,

building contact lists for households to target for implementation, and support the finalization of program design.

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