



+1 (202) 987 3770

strongertogether@justiceclimatefund.org

www.justiceclimatefund.org

910 17th Street, NW, Suite 820
Washington, DC 20006



Justice Climate Fund
Request for Proposals (RFP) for Financial Management Services

SUMMARY: Justice Climate Fund (JCF) is seeking accounting and financial management services from organizations or individuals that can support JCF as it transitions from fiscal sponsorship to stand-alone financial management in conjunction with receipts of \$940 million from the Environment Protection Agency’s (EPA) Greenhouse Gas Reduction Fund (GGRF) Clean Communities Investment Accelerator (CCIA) program. The proposer must be prepared to support JCF in the design, implementation, and management support of financial management and accounting systems. Also, the ideal proposer will support JCF with Board, staff, and coalition partner training on issues related to fiduciary best practices relating to federal funding on a weekly, monthly, and annual schedule. JCF invites RFPs/proposals from organizations or individuals with accounting, nonprofit, and tax matters in connection with the EPA’s CCIA grant award. A description of our organization, services needed, and other pertinent information follows.

DESIGNATED RFP CONTACT: All correspondence for this RFP should be directed to:

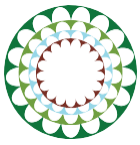
cc: Sampriti Ganguli (sganguli@justiceclimatefund.org)
Justice Climate Fund
Email: coalitionsupport@justiceclimatefund.org

RFP SUBMISSION INSTRUCTIONS:

Email the entire proposal as a single-document attachment by May 17, 2024 at 11:59 PM Eastern Time to “coalitionsupport@justiceclimatefund.org”. The proposal must be written in English, and submitted by email. For questions regarding this request for proposals, please send an email to coalitionsupport@justiceclimatefund.org

REQUEST FOR PROPOSALS SCHEDULE:

Release of Request for Proposals	May 6, 2024, 5:00 pm ET
Deadline for Submission of Questions	May 9, 2024, 5:00 pm ET
Deadline for JCF to Respond to Questions	May 13, 2024, 5:00 pm ET
Submission of Proposals (date and time)	May 17, 2024, 5:00 pm ET
Announcement of Selections	May 27, 2024
Anticipated Contract Start Date	June 1, 2024
Anticipated Contract End Date	September 30, 2030 (6-year performance period)



ORGANIZATION DESCRIPTION

[JCF](#) is a nonprofit financial institution created to scale the nationwide deployment of affordable, equitable clean energy improvements for disadvantaged American families, businesses, and communities. JCF achieves its mission by enabling and deploying capital through America's Main Street financial institutions — the very community lenders that have delivered, for decades, financial opportunity, security, and prosperity to struggling Americans. JCF's network of community lenders pioneered community-based lending. By focusing on communities, JCF will enable American families, communities, and businesses to save money and deliver a greener, cleaner, safer, and more inclusive future for us all. Through the CCIA program, JCF will equip community lenders with new skills, tools, and relationships to successfully deploy affordable, responsible green lending in communities across the country, especially those that are low-income and disadvantaged.

CLEAN COMMUNITIES INVESTMENT ACCELERATOR PROGRAM ([CCIA](#)):

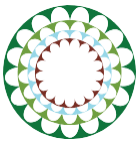
Under the \$6 billion Clean Communities Investment Accelerator, JCF (along with four other selected applicants) will establish hubs that provide funding and technical assistance to community lenders working in low-income and disadvantaged communities, providing an immediate pathway to deploy projects in those communities while also building the capacity of hundreds of community lenders to finance projects for years. Each of the selectees will provide capitalization funding (typically up to \$10 million per community lender), technical assistance sub-awards (typically up to \$1 million per community lender), and technical assistance services so that community lenders can provide financial assistance to deploy distributed energy, net-zero buildings, and zero-emissions transportation projects where they are needed most. 100% of capital under the CCIA is dedicated to low-income and disadvantaged communities. [Justice Climate Fund was selected for a \\$940 million award](#) to provide responsible, clean energy-focused capital and capacity building to community lenders across the country.

SCOPE OF WORK

The scope of work entails the engagement of a CPA firm or individuals to support organizational and financial & accounting systems set-up and design, as well as the development of core activities within finance, accounting, and operations. The selected firm will be tasked with evaluating the current organizational and systems structures, identifying areas for improvement, and designing strategies for enhanced efficiency and effectiveness to meet federal government compliance requirements. The selected firm will develop sequencing plans to ensure smooth integration and transition of recommended changes, considering dependencies and potential impacts on daily operations. Throughout the engagement, the firm will provide ongoing support and guidance to facilitate successful implementation, addressing any challenges that may arise and ensuring alignment with organizational goals and objectives.

Core activities include:

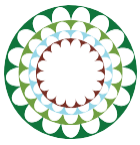
- *Development of Financial Policies and Implementation of Industry Leading Financial Technology:* Collaborate with stakeholders to formulate comprehensive financial policies aligned with organizational objectives and federal regulatory requirements. These policies include areas such as budgeting, expenditure control, cash management, and financial reporting. Additionally, the firm or individual will leverage financial technology solutions to enhance efficiency and accuracy in financial operations, including software for accounting, reporting, and analysis. Furthermore, the firm or individual will act as a supplementary capacity within the finance team, providing expertise and support as needed to address workload fluctuations, special projects (i.e., migration from



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fiscal sponsorship), or skill gaps. Through these initiatives, the firm or individual will contribute to strengthening financial management capabilities and driving organizational success.

- *Ongoing Financial Management Services:* Provide a comprehensive range of financial management services and support, including systems reviews and implementations, staffing design, process optimization reviews, compliance audits, preparing monthly P&L and income statements, bank reconciliations, AP, AR, maintaining vendor files, budget to actual files. Create board-ready monthly financial statements per GAAP standards.
- *Federal Government (EPA) Compliance:* Collaborate with stakeholders to implement tailored solutions aimed at enhancing efficiency, accuracy, and compliance with federal grants systems. The firm or individual will provide expertise in staffing design, assisting in the development of organizational structures and roles to support effective financial management and government compliance. The successful applicant should be prepared to provide examples of how it can provide comprehensive accounting and government compliance manuals to standardize processes and facilitate knowledge transfer within the organization and its broader Coalition.
- *Federal Government Grants Management:* Recommend and implement a grants management system tailored to the organization's needs and objectives and enhance the organization's ability to effectively manage and track federal funding. This may involve selecting and configuring software solutions specifically designed for federal government grant management and integrating the new system with existing processes. Activities would include: SAM Registration of Prime and Subrecipients, ensuring all entities involved in federally funded projects are properly registered in the System for Award Management (SAM), management of Federal Subaward Reporting Systems to ensure accurate and timely reporting of federal subawards, compliance with the allowability of expenses and Reasonableness of costs, certification of costs to verify accuracy and legitimacy, audit documentation, including oversight and accountability for A-133 and GAAP audits, creation of single Audit processes to evaluate compliance with federal regulations and Accounting System Audits and Indirect Rate Audits to ensure the integrity and reliability of financial systems and reporting.
- *Chart of Accounts Management:* Develop a tailored chart of accounts that aligns with the organization's needs - ensuring consistency, accuracy, and ease of use in financial reporting. Additionally, the firm or individual will work closely with stakeholders to create detailed budgets that reflect the organization's financial goals and priorities. This process will include forecasting revenues and expenses, allocating resources effectively, and establishing benchmarks for performance measurement.
- *Financial Best Practices Training, Development and Capacity Building:* Develop tailored manuals compliant with [EPA's 6600-09 administrative capability Questionnaire](#) and training that outline clear guidelines and processes for financial management, budgeting, travel, accounting, procurement, and reporting. These manuals and training will be designed to ensure compliance with regulatory requirements, promote transparency and accountability, and mitigate financial risks. Additionally, the firm or individual will work closely with stakeholders (Board, management, and external coalition) to ensure that the manuals are accessible, user-friendly, and aligned with organizational goals and objectives.



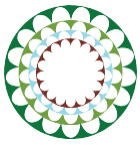
BUDGET

- We do not have a firm budget for this scope of work and look forward to the market helping to inform the cost estimate.
- We plan to issue one award to one organization, and we are open to different billing structures, including fixed price, cost reimbursement (with profit margin negotiated), and time and materials.
- If cost reimbursement or time and materials methodology is chosen, please provide a detailed build-up of your proposed cost.
- Budget will be subject to terms and conditions negotiated with EPA.

PROPOSAL MATERIALS

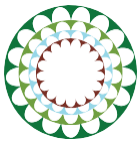
Responses should include:

1. Cover Letter – Should include the name, title, address, telephone number, and e-mail address for point of contact for the respondent organization on company letterhead.
2. Qualifications – Should include the contractor’s qualifications to conduct the scope of work activities, expertise, knowledge, and experience. Experience should include examples of conducting similar or related work.
3. Project Approach – Should include a narrative of contractor’s proposed approach, including:
 - a. The process and specific activities to be conducted to achieve the stated goals.
 - b. A timeline for the activities.
 - c. Milestones and a detailed list of deliverables tied to activities.
 - d. A detailed budget for each task, along with a proposed payment schedule tied to
 - e. project milestones or deliverables (if applicable).
 - f. Project Budget – detailed submission and/or labor rate or price listing of all rates for all individuals who will work on the project (if applicable).
4. Engagement Team – resumes and bios for each individual on the specific engagement team we will be working with on a day-to-day basis, including information about experience with similar projects and professional qualifications.
5. Approach to the diversity of the engagement team specifically and, more generally, whether any disadvantaged business enterprise (“DBE”) will be subcontracted as part of your approach to fulfilling our scope requirements. We would also like to see any commitments the firm has to justice, equity and inclusion, including information on diversity training, supplier diversity programs, pro-bono and/or charitable contribution commitments.
6. References – Attach current contact information of clients for whom similar services were provided based on the past projects identified in the qualification form. Please provide at least two references.
7. Disclosure and Certifications
 - a. Indicate whether you are presently engaged or plan to be engaged with any other recipient of Greenhouse Gas Reduction Fund dollars;
 - b. Conflicts of Interest Statement (see below section on Conflicts of Interest);
 - c. Lobbying Certification (see below section on Byrd Anti-Lobbying Amendment).
 - d. Partner Demographics Questionnaire



SELECTION CRITERIA

Criteria	Max Points
<p>MANDATORY CRITERIA: Proposals will not be considered for evaluation without meeting all of the following mandatory criteria:</p> <ul style="list-style-type: none"> A. Licensed certified public accountant (accounting firm.) B. Independent. C. No record of substandard work. 	25
<p>TECHNICAL CRITERIA: Those proposers who have met each of the criteria above will be evaluated on the following criteria:</p> <p>A. Responsiveness of the proposal in clearly stating an understanding of the work to be performed.</p> <ul style="list-style-type: none"> 1. Comprehensiveness of the services to be performed/ scope of work. 2. The proposer has prior experience working on similar projects. 3. The proposer has prior experience working with similar organizations. 4. Quality of submitted work samples. <p>B. Firm's technical experience.</p> <ul style="list-style-type: none"> 1. Satisfactory completion of accounting services of the type under consideration in the proposal. 2. Demonstrates an understanding of the project objectives and desired results. 3. Illustrates an approach to the scope of work that will likely lead to successful results. 4. Illustrates the contractor's ability to successfully execute the proposed approach. 5. Details project activities and milestones, or deliverables, associated with each stage of the scope of work. 6. The work can be completed within the required project timeline. <p>C. Qualifications of proposed staff.</p> <ul style="list-style-type: none"> 1. Qualifications of supervisory personnel. 2. Experience auditing agencies of the type under consideration. 3. Experience auditing similar entities. <p>D. Firm's quality control program.</p> <ul style="list-style-type: none"> 1. Internal quality control program for governmental audits and compliance with EPA program guidelines. 2. Participation in peer reviews and receiving a positive review report. <p>E. Firm's commitment to justice and equity</p> <p>Evidence of firm or individual commitment to justice and equity through demonstration of diversity plans, past performance with diverse businesses, and commitments to diversity and inclusion initiatives.</p>	50
<p>COST CRITERIA: Reasonableness of proposed audit cost (considering hourly billing rates, number of audit hours, out-of-pocket expenses, and total proposed cost).</p> <ul style="list-style-type: none"> A. The proposal includes a detailed budget for each stage of the scope of work. B. The proposed costs are reasonable. C. The proposed changes to JCF's standard contract terms and conditions are acceptable. 	25
Total Points (max)	100



ATTACHMENT A - REQUIRED TERMS AND CONDITIONS FOR CONTRACTS SUPPORTED BY FEDERAL FUNDS

The following terms and conditions are required to be included in any contract(s) awarded as a result of this solicitation that are supported by federal funds, in whole or in part, during the life of the contract(s). As used herein, “Contractor” shall refer to the selected Proposer and “contracting entity” shall refer to JCF.

BUY USA - DOMESTIC PREFERENCE FOR PROCUREMENTS

1. Contractor should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award.
2. For purposes of this section:
 - a. “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.
 - b. “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

YRD ANTI-LOBBYING AMENDMENT, 31 U.S.C. § 1352 (AS AMENDED)

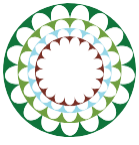
Contractors that apply or bid for an award exceeding \$100,000 shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or firm for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier, up to the non-Federal award.

CLEAN AIR ACT AND WATER POLLUTIONS CONTROL ACT PROVISIONS

Contractor agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Federal Clean Air Act, as amended (42 U.S.C. § 7401 et seq.), and the Federal Water Pollution Control Act, as amended (33 U.S.C. § 1251 et seq.) Contractor agrees to report each violation to the contracting entity and understands and agrees that the contracting entity will, in turn, report each violation as required to assure notification to the grantor federal agency and the appropriate Environmental Protection Agency Regional Office. Contractor agrees to include these requirements in each subcontract exceeding \$150,000 financed in whole or in part with federal assistance.

CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (FOR ANY CONTRACTS IN EXCESS OF \$100,000 WHEN LABORERS OR MECHANICS ARE USED)

1. *Overtime requirements:* No Contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic, in any workweek in which he or she is employed on that work, to work more than forty hours in such a workweek unless such laborer or mechanic receives compensation



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at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such a workweek.

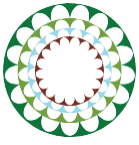
2. *Violation: liability for unpaid wages; liquidated damages.* In the event of any violation of the clause set forth in paragraph (1) of this section, Contractor and any subcontractor responsible therefor shall be liable to the affected employee for the unpaid wages. In addition, such Contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory) for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic employed in violation of the clause set forth in paragraph (1) of this section, in the sum of \$10 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (1) of this section.
3. *Withholding for unpaid wages and liquidated damages.* The contracting entity shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by Contractor or subcontractor under any such contract or any other federal contract with the same Contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same Contractor, such sums as may be determined to be necessary to satisfy any liabilities of such Contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (2) of this section.
4. *Subcontracts.* Contractor or subcontractor shall insert in any subcontracts the clauses set forth in paragraphs (1) through (4) of this section and also a clause requiring the subcontractors to include these clauses in any lower-tier subcontracts. The prime Contractor shall be responsible for compliance by any subcontractor or lower-tier subcontractor with the clauses set forth in paragraphs (1) through (4) of this section.

COPYRIGHT AND DATA RIGHTS (IF APPLICABLE)

1. Data, as used herein, shall include any work subject to copyright under 17 U.S.C. § 102, for example, any written reports or literary works, software and/or source code, music, choreography, pictures or images, graphics, sculptures, videos, motion pictures or other audiovisual works, sound and/or video recordings, and architectural works.
2. Contractor grants to the contracting entity, a paid-up, royalty-free, nonexclusive, irrevocable, worldwide license in data first produced in the performance of this contract to reproduce, publish, or otherwise use, including prepare derivative works, distribute copies to the public, and perform publicly and display publicly such data.
3. For data required by the contract but not first produced in the performance of this contract, Contractor will identify such data and grant to the contracting entity or acquires on its behalf a license of the same scope as for data first produced in the performance of this contract.
4. Upon or before the completion of this contract, Contractor will deliver to the contracting entity data first produced in the performance of this contract and data required by the contract but not first produced in the performance of this contract in formats acceptable by the contracting entity.

FEDERAL COMPLIANCE

Contractor acknowledges that Federal funds will be used to fund all or a portion of the contract. Contractor will comply with all applicable Federal law, regulations, executive orders, policies, procedures, and directives. This specifically includes, *but is not limited to*, all 2 CFR 200 requirements, and any Inflation Reduction Act (IRA) requirements and guidance established by the United States



Department of the Treasury and/or the EPA for IRA funding. It also includes any legal requirements applicable to the Bipartisan Infrastructure Law, Greenhouse Gas Reduction Fund, and Urban Area Security Initiative (UASI) funding.

PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT (HUAWEI AND ZTE) (IF APPLICABLE)

Contractor and any sub-contractor are each prohibited from obligating or expending loan or grant funds to:

1. Procure or obtain;
2. Extend or renew a contract to procure or obtain; or
3. Enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. As described in Public Law 115–232, section 889, covered telecommunications equipment is telecommunications equipment produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliate of such entities).

(1) For the purpose of public safety, security of government facilities, physical security surveillance of critical infrastructure, and other national security purposes, video surveillance and telecommunications equipment produced by Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliate of such entities).

(2) Telecommunications or video surveillance services provided by such entities or using such equipment.

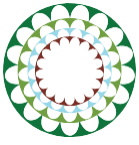
(3) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country.

PUBLICATIONS CLAUSE (FOR INFLATION REDUCTION ACT “IRA” FUNDS)

Any publications produced with funds from this award must display the following language: “This project [is being] [was] supported, in whole or in part, by federal award number [enter project FAIN] awarded to [name of Recipient] by the U.S. Department of the Treasury.” This requirement is subject to change based on the requirements of EPA.

RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT (IF APPLICABLE)

Contracts or agreements for the substitution of parties, assignment, or performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any applicable implementing regulations.



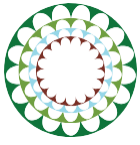
SUSPENSION OR DEBARMENT

1. No contract will be awarded to a Contractor or any party that is debarred from working on federally funded projects, as listed on the government-wide exclusions list in the System for Award Management (SAM) at www.sam.gov, in accordance with the OMB guidelines at 2 C.F.R. Part 180.
2. This contract is a covered transaction for purposes of 2 C.F.R. Part 180 and 2 C.F.R. Part 3000. As such, Contractor is required to verify that none of Contractor's principals (defined at 2 C.F.R. § 180.995) or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).
3. The bidder or proposer agrees to comply with the requirements of 2 C.F.R. Part 180, subpart C and 2 C.F.R. Part 3000, subpart C while this offer is valid and throughout the period of any contract that may arise from this offer.

AUDITS

The sub-recipient must submit the audit to the recipient within 9 months of the end of the recipient's fiscal year or 30 days after receiving the report from an independent auditor, whichever is earlier. As provided in 2 CFR 200.337(a) the recipient must provide EPA, the EPA Office of Inspector General, and the Comptroller General with access to the subrecipient's independent auditor reports.

[Signature Page Follows]



ACKNOWLEDGMENT AND CERTIFICATION:

On behalf of [NAME OF FIRM], I hereby:

1. Acknowledge that the specific terms and conditions outlined in this Attachment A will be fully incorporated into any contract(s) awarded as a result of this solicitation that are supported by Federal funds, in whole or in part, during the life of the contract(s); and
2. Commit to adhere to all relevant regulations, guidelines, and requirements outlined in this RFP and all Attachments contained within this RFP. Compliance with these regulations is crucial for maintaining the integrity of the qualification process and ensuring fair evaluation.

Name of Firm:

Name of Individual:

Title:

Signature: _____

Date:

SIGN AND RETURN THIS FORM WITH YOUR PROPOSAL SUBMISSION

- a) Promptly notify JCF in writing of any legal proceedings resulting from any subcontract or other commitment related to the terminated portion of the contract;
- b) Settle outstanding liabilities and proposals arising out of the termination; and
- c) If there is a terminated construction contract, ensure the cleanup of the site, protection of serviceable materials, removal of hazards, and other actions necessary to leave a safe and healthful site.

END OF DOCUMENT