



Request for Proposals
**State and Territory Energy Offices Supporting Energy-
Efficient and Healthy K-12 Schools**

Solicitation Number: NASEO-2024-RFP-002

Released: March 15, 2024
Responses Due: April 15, 2024

National Association of State Energy Officials
1300 17th Street North, Suite 1275
Arlington, Virginia 22209

Note on applicants' eligibility: All applicants must meet the [DOE Mandatory Requirements and Standard Provisions](#). This includes having a current registration in SAM.gov and providing assurance that applicant is not a debarred or suspended entity.

I. Introduction and Background:

Energy-efficient technologies and practices present significant opportunities to reduce energy consumption, energy costs, and greenhouse gas emissions in the elementary and secondary schools' sector (K-12 schools), as well as contribute to state, local, and federal energy efficiency, economic, and educational attainment goals. With reduced monthly utility bills and operating costs, school districts can allocate more resources to educational programs and initiatives. Moreover, high-quality and modern school facilities provide students with supportive learning environments that promote academic achievement and well-being, and educators with healthy and productive workplaces. Energy-efficient features such as efficient Heating, Ventilating, and Air-Conditioning (HVAC) systems, LED lighting, properly air-sealed and insulated building envelope, and highly efficient fenestration contribute to maintaining a comfortable and healthy indoor environment, which can ultimately enhance educational outcomes.

State and Territory Energy Offices, referred to as “State Energy Offices” throughout this Request for Proposals (RFP), and their partners play an important role in supporting energy efficiency improvements and energy education in K-12 public school facilities. School energy programs can be an opportunity to support multiple goals across various stakeholders: advancing state and local energy goals by helping school districts manage building energy use and emissions, advancing the clean energy workforce and overall energy literacy with well-designed energy curricula, and enhancing community resilience by designing high-quality public-school facilities that may serve as emergency shelters and resilience hubs when needed.

The National Association of State Energy Officials (NASEO) seeks a *Contractor* with strong relationships with K-12 public school stakeholders and a deep understanding of the role that State Energy Offices and partnering state agencies can play to support local education agencies in improving the energy efficiency and indoor air quality of school facilities. The *Contractor* will support activities as part of NASEO’s work with the U.S. Department of Energy (DOE) Building Technologies Office,¹ to accelerate energy efficiency retrofits and improvements to indoor air quality, among other practices that produce healthy and efficient schools.²

¹ The funds for this work have been provided through a cooperative agreement between NASEO and DOE’s Building Technologies Office. The underlying terms and conditions of the cooperative agreement between DOE and NASEO will be provided to the Contractor and incorporated in the awarded subcontract. 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 NASEO and the Contractor.

² 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.

The *Contractor* will assist NASEO in developing timely and topical work products and supporting State Energy Offices in engaging various state, federal, and local-level school stakeholders. The guiding principle of the partnership with NASEO will be to enhance the capacity and expertise of decision-makers who can direct investments toward school energy performance, facility quality, and energy education. The *Contractor* will leverage their strong network of school administrators, superintendents, facilities managers, business officials, educators, energy efficiency experts, and indoor air quality experts, as well as their robust understanding of the nexus between elementary and secondary education and energy.

III. Approach

This and the following section (**Statement of Work, Timeline and Expected Deliverables**) outline tasks and work products that the *Contractor* will be expected to complete. Responses to this RFP should discuss the *Contractor's* proposed plan, organizational mission alignment, and staffing capacity or expertise to support each of the work products over the performance period of 3.5 months.

The *Contractor* will support NASEO by:

- 1) Advising on content and speakers for two (2) **In-Person Workshop Events**, one national and one regional meeting, convening interested State Energy Offices and relevant school stakeholders on opportunities for increased coordination, innovative partnerships, and strategies to address funding and program needs in the K-12 schools sector.
- 2) Developing up to three (3) **Case Studies** on state-level initiatives, which will be informed by takeaways from the preceding **In-Person Workshop Event(s)**, for accelerating school energy improvements. These **Case Studies** will be developed with guidance from, and in close collaboration with NASEO. The **Case Studies** should be written for non-technical audiences within State Energy Offices (primary audience). Other state entities, such as State Education Agencies, governors' offices, school district superintendents, and school district facility managers, will serve as secondary audiences. Content should clearly outline specific actions and best practices for State Energy Offices and include any relevant graphics, tables, or maps. The proposed content of these **Case Studies** is outlined in more detail below.

IV. Statement of Work, Timeline, and Expected Deliverables

Under a multi-year cooperative agreement, DOE and NASEO identified K-12 schools as a priority building type for the commercialization and market integration of advanced building

technologies, resources, and tools that optimize energy use and building performance. NASEO utilizes its expertise in state energy policy, planning, and data analysis, as well as its unique position as a convener, to ensure that federal resources reach State Energy Offices and likewise support state research, development, and deployment goals. NASEO and the *Contractor* will use the work products described in this RFP as opportunities to share relevant BTO research, tools, and resources with the joint audiences of State Energy Offices and elementary and secondary education partners.

NASEO's approach to achieving these intended outcomes will be to present BTO research findings, resources, and tools during the ***In-Person Workshop Events*** or virtual forums with State Energy Office audiences; and to develop up to three (3) ***Case Studies*** about existing K-12 school energy efficiency and facility quality programs involving either a State Energy Office or a partnership between a State Energy Office and a State Education Agency in a technical, administrative, or support capacity.

Within the specified performance period in this RFP, the *Contractor* will support NASEO in organizing one national and one regional ***In-Person Workshop Event*** by:

- Suggesting workshop sessions, activities, and interactive exercises for the event agenda(s). These may be based on recommendations and frameworks for state engagement with K-12 school stakeholders and state support of healthy schools from previous NASEO publications.
- Proposing diverse speakers for workshop session panels, including perspectives from State Education Agencies, school district superintendents, school boards, facility managers, energy service companies, and non-profit partners.
- Identifying and assisting with outreach to prospective attendees from the K-12 public school sector, with whom State Energy Offices can foster effective and strategic partnerships.
- Synthesizing action items and takeaways following the event(s) and compiling resources for dissemination to attendees and interested partners.

Within the specified performance period in this RFP, the *Contractor* will work with NASEO to develop three (3) ***Case Studies*** that:

- Highlight key findings and recommendations from the ***In-Person Workshop Event(s)***.
- Identify best practices from existing state-level programs on one or more of the following facets of how State Energy Offices can support school stakeholders: governance, data management, planning, funding and financing, technical expertise for facilities management, and accountability systems.

- Suggest relevant entities, including state education agencies, school district facility managers and administrators, school principals, school business administrators, capital project investors, investor- and consumer- owned utilities, and energy services companies, among others, that State Energy Offices can engage (or vice versa) for effective program deployment.
- Develop recommendations for how states can recreate existing program models, including key program design elements, program administration and operation requirements, how to acquire sustainable funding streams, and more.
- Suggest opportunities to leverage additional sources of funding to implement energy efficiency and indoor air quality projects, such as federal tax credits and deductions, state administered revolving loan funds and Green Banks, and public private partnerships such as Energy Saving Performance Contracts.
- Supplement [the map of K-12 state energy programs](#) developed by NASEO.

Each of the **Case Studies** should be approximately four to six pages, including figures and graphics, to be brief and accessible for practitioners while still achieving the intended outcome. Responses to this request should discuss the *Contractor’s* implementation plan, organizational mission alignment, and staffing capacity or expertise to support the suggested work products over the anticipated performance period. All materials developed are solely the property of NASEO and NASEO maintains all editorial control over all work products.

Project Schedule (Estimated)

Task	Estimated Deliverable Date*
Kickoff Meeting with NASEO Staff	May 1, 2024
In-Person Workshop Event(s)	
Workshop Event Planning Support	May 1 – May 30, 2024
Attend Workshop Event	TBD
Case Studies	
Draft Outlines	July 1, 2024
Drafts	August 1, 2024
Final Drafts	August 31, 2024

** The deliverable timeline may change depending on timeliness of internal and external review. Final document review by DOE may also delay final deliverable date.*

Upon confirmation of the contract award, the *Contractor* and relevant contractor staff will attend a kickoff meeting with NASEO staff to facilitate introductions and review the project schedule and expected deliverables.

Following the kickoff meeting, the *Contractor* will begin assisting NASEO on developing agendas, identifying speakers, and inviting attendees for two ***In-Person Workshop Events***, one regional and one national, which will be scheduled based on available times in the NASEO event schedule.

After the conclusion of the ***In-Person Workshop Events***, the *Contractor* will develop outlines of the ***Case Studies*** to be reviewed, edited, and approved by NASEO. With approval from NASEO, the *Contractor* will develop drafts of the ***Case Studies*** to be reviewed and commented on by NASEO, DOE, and select State Energy Office directors and staff. Based on the comments, the *Contractor* will update and prepare final versions for NASEO. Upon approval, the *Contractor* will finalize the ***Case Studies*** for subsequent publication and distribution by NASEO. The *Contractor* does not have the right to reproduce, utilize portions of, or publish material from the ***Case Studies*** without NASEO's express written permission. The ***Case Studies*** should be delivered to NASEO in Microsoft Word format along with all relevant graphic files.

V. Period of Performance

The project period of performance is anticipated for April 30, 2024, through August 31, 2024, with the opportunity for contract amendments allowing for a no-cost extension.

VI. Project Budget

The proposed project budget should reflect a time and materials agreement. This is a competitively bid project; costs should be feasible and prudent. The *Contractor* must submit cost proposals by task for the entire Statement of Work using the DOE EERE budget justification spreadsheet which is a separate file available for download [from DOE's website](#). NASEO may request changes to the proposal if the proposed scope exceeds the available budget.

Compensation

The *Contractor* shall invoice monthly for actual work completed. NASEO shall reimburse the *Contractor* for actual milestones achieved and hours spent in the execution of the work (not to exceed the total approved task budget shown in the final contract agreement) once NASEO has received payment from DOE. The *Contractor* will submit a monthly invoice (including timesheet details) and progress report by the tenth of each month of the agreement.

Rejection of Proposals and Incurred Costs

This Request for Proposals (RFP) does not obligate NASEO to award an agreement. All costs incurred in response to this RFP are the responsibility of the respondent.

NASEO reserves the right to reject any or all submitted proposals not in conformance with this RFP, or for other causes. NASEO reserves the right to request new proposals or to cancel all or part of this solicitation.

VII. Contract Requirements

The funds for this work have been provided through a cooperative agreement between NASEO and DOE's Building Technologies Office. The underlying terms and conditions of the cooperative agreement between DOE and NASEO will be provided to the *Contractor* and incorporated in the awarded subcontract. 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 NASEO and the *Contractor*.

VIII. Responding to the RFP

Please submit responses to the RFP to Ed Carley by email at ecarley@naseo.org. RFP responses are due **no later than April 15, 2024**. Any questions on the RFP should be directed to Ed Carley at ecarley@naseo.org and Jasmine Xie at jxie@naseo.org by email, no later than April 12, 2024. All questions received and answers will be posted to the NASEO RFP website.

Responses shall include and fully address the following:

- Cover letter (should include the following):
 - Unique Entity Identification Number
 - SAM.gov registration expiration date
 - Assurance that applicant is not a debarred or suspended entity
- Resumes of key personnel (please identify any foreign nationals included in the proposal)
- Proposed approach to completing the expected deliverables, including a description of access to and familiarity with key state- and local-level educational stakeholders
- Proposed Budget by Task Deliverables (the budget should be completed using the [DOE EERE budget justification spreadsheet](#). Please note that there is no cost-share requirement, applicant can use either the 3-year or 5-year budget justification and add all costs for their proposal under Budget Period 1)

Please limit the cover letter, the description of relevant experience, and the narrative that addresses the proposed approach and development of the project tasks and proposed budget to **5 pages in 11-point font**. Resumes and the proposed budget do not count toward the page limit.

Note: Late proposals will not be accepted.

IX. Contractor Selection and Required Qualifications

NASEO will select a *Contractor* through a competitive selection, which will include consideration of the following:

- Experience working with State Energy Offices or other relevant state agencies.

- Established relationships with local educational agency stakeholders, including superintendents, school board officials, facility managers, and relevant non-profits or advocacy organizations.
- Deep understanding of the gaps and needs of the elementary and secondary education sector as it relates to energy performance, facility quality, resource availability, and supportive programming or policies.
- Deep knowledge of energy efficiency policy and programs in K-12 schools and similar building types.
- Deep knowledge of indoor air quality policy and programs in K-12 schools and similar building types.
- Knowledge of tax credits and deductions (e.g. 179d, 48), and other financial mechanisms (e.g., Energy Savings Performance Contracting) for reducing the cost impact of facility improvements.
- Demonstrated ability to convene state and local school leaders to address energy efficiency and indoor air quality.
- Relevant experience facilitating equitable community engagement.
- Competitive budget proposal.
- Quality of academic and professional experience in relevant field.
- Flexibility of availability.

The NASEO Evaluation Team will use the following criteria in assessing all responses to this RFP:

Technical Experience and Applicant Qualifications (40% of total score)

- Relevant experience in proposed topics in the energy sector, particularly working with State Energy Offices and other state and local agencies.
- Adequate level of technical knowledge to meet the demands of the project.
- Quality of academic and professional experience in relevant field.

Proposed Approach for Implementation (30% of total score)

- Proposal responds to the outlined topics in the RFP.
- Existing resources / consultant availability to meet needs of flexible deployment.
- Overall quality and professionalism of the proposal (well-written, structured and organized) and materials are provided in the format requested.

Budget (30% of total score)

- The estimated cost is appropriate for the proposal.
- Overall costs reflect efficient value for the level of effort.
- The level of effort for each task is appropriate.

Administrative

- The applicant has a Unique Entity Identification Number and a current SAM.gov registration.

- The applicant is not a debarred or suspended entity.

Proposals Specifically Not of Interest

- Proposals to install products in K-12 schools
- Energy savings performance contracting services
- Engineering, mechanical, or architectural services

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

Contract Selection: Anticipated by April 30, 2024.