

AGGREGATED QUESTIONS FROM PROGRAM MANAGEMENT CONSULTING RFP

1. Would CPC would entertain a bid submission from a group of industry consultants that would partner together to complete the proposed services?
 - **CPC intends to contract with one firm only but is open to that firm subcontracting services out to other parties.**
2. Is there an opportunity for a project scoping discovery meeting with potential bidders?
 - **CPC will likely be conducting interviews after receipt of the responses but we do not intend to have meetings about the scope of services. If there are specific items you wish to discuss, please put your questions in writing.**
3. What are the CUF requirements for CPC Climate that have been defined?
 - **The terms and conditions have not yet been finalized nor have we received a draft subrecipient agreement containing all of the flow down requirements. We know that all federal cross cutting requirements are applicable, including, but not limited to, Davis Bacon (with certain carve outs depending on the product), possibly BABA (pending final guidance), Coastal Zone Management, Endangered Species Act, and NHPA.**
4. Is the referenced Operating Model the same model described in the CUF Application?
 - **No, the CUF Application referred to the CUF operating model. CPC Climate is building out its own operations structure for its operating activities.**
5. Please clarify that the Proposer should include only a detailed budget for each task and then outline the overall approach for all tasks to include a timeline, milestones and deliverables (rather than all of those elements for each task).
 - **Confirmed, a detailed budget for each task and an overall approach for all tasks should suffice.**
6. Should the proposer recommend a schedule such as monthly or quarterly invoicing?
 - **Yes**
7. Is it the expectation that all data and IT applications be managed and hosted by the service provider, or will CPC Climate or CPC systems and applications be part of the ecosystem?
 - **We anticipate technology and associated business support to be part of the “shared services” provided to CPC Climate Capital by the parent entity; we are planning for CPC Climate Capital’s usage of at least some existing applications and will manage all data through our existing centralized warehouse.**
8. Please provide further clarity on the weighting of each criteria/metric considered in CPC's first-tier and second-tier evaluations. For example, what are the points assigned to each evaluation criteria in each tier?
 - **CPC will give more weight to the first-tier criteria than the second-tier criteria.**
9. Will the new employees be part of the existing office or is there physical separation? Will CPC be providing the managed IT services (computers/helpdesk/cybersecurity) for the organization or does that need to be line itemed?
 - **This is still TBD but the current plan is that full time staff of CPC Climate Capital fully dedicated to working on the grant program will be housed at one of CPC’s existing offices and we intend to allocate a portion of the office space to the grant. We plan to**

share some of the existing IT services by possibly having CPC Climate enter into its own Statement of Work with CPC's existing providers.

10. Are the services to be provided in support of the entire \$6,970,000,000 EPA award to Climate United Fund, or a subaward to CPC Climate Capital LLC? If so, what is the amount of the subaward?
 - **No, the services to be provided are not for the entire award. CPC Climate is a coalition member of Climate United Fund and intends to enter into a subrecipient agreement with CUF to administer a portion of the award in the amount of \$2,420,000,000.**
11. What standard and methods will CPC use to measure GHG reduction for each activity? Will this require an on-site physical inspection? If so, who will conduct the assessment?
 - **CUF is in the process of negotiating the reporting requirements with EPA, but EPA has indicated that they will be rolling out GHG Reduction Calculators, which will take some of the burden off of Recipients by only requiring us to report *inputs* and allow EPA to calculate GHG reductions using a consistent methodology across all GGRF Recipients on a per-product/segment basis. Information is still incoming from EPA as to the requirements, but we also anticipate operating within rigorous, structured Quality Management and Quality Assurance Project Plans for environmental data collection and processing.**
12. Does CPC have a preference for physical location of staff or office? If physical location preferred, please specify which location and number of staff required to be on-site.
 - **This will be a combination of CPC Climate full time staff being situated on-site in CPC's existing office space, working remotely, and being physically located in other locations throughout the country.**
13. Offeror wishes to preserve the confidentiality of submitted information such as financial statements, trade secret information, or otherwise confidential information. In addition to the original copy of the proposal, will CPC accept a redaction version at the time of submission?
 - **We will accept both but will require guidance on how to handle the unredacted version.**
14. If an organization does not track LGBTQIA+ metrics, is it sufficient to provide the diversity metrics that we do track which are: Male/Female and Race and Ethnicity?
 - **Yes**
15. Does CPC have technology systems it plans on utilizing? If so, can you provide the name of the system and purpose?
 - **CPC plans on utilizing some of its existing technology to the extent that CPC Climate can be added pursuant to Statements of Work. We are a Microsoft-based organization and specific systems and their usage can be discussed with candidates of interest.**
16. Can you provide more clarification on what the specific initiatives will be supported under the Operating Model?
 - **The specific initiative is to implement the compliance portion of CPC Climate's program for the decarbonization of multifamily buildings through a subordinate loan program.**
17. If the Proposer is certified at the state level as a WBE or DBE, is that a qualifying entity?

- **If the Proposer is a qualified disadvantaged business enterprise, that will be a tier two consideration in scoring.**
18. Is there any recordings or materials from the listening sessions that were held across the country to help provide additional information to support this RFP?
 - **The EPA has information about the Program on its website.**
 19. Will CPC consider an extension on the proposal submission date due the extent of research necessary to submit a qualified submission?
 - **No, the applicants are on a very tight timeframe with the EPA and therefore CPC does not plan on extending the submission date of this RFP at this time. The services need to be in place in the near term.**
 20. Does CPC expect Proposer to set up local office in the city/states of the grant winners or can the work be done completely remotely?
 - **CPC's central office is located in NYC but CPC also has various satellite offices in other parts of NY and elsewhere across the country. The work of the Proposer should be hybrid – with some on site staff and some remote workers.**
 21. Is there a Project Budget/Pricing form that we should be using as part of our submission? If not, what is the exact format that CPC what Proposers to provide? RFP states rates for ALL individuals on the project, since there is very limited information provided in the RFP, can CPC identify Key Personnel that should be listed with hourly rates? Should the hourly rates be fully loaded with all overhead and profit or should the rates be direct rates with separate multiplier for overhead and profit?
 - **It is the function of the respondent to review the RFP, determine the staff required to implement the services, list the personnel and include the hourly rates inclusive of overhead and profit.**
 22. In the press release, there were four locations identified (Durham, NC; Milwaukee, WI; NYC; and Rapid City, SD) - have those areas been awarded grants or will determining the different grant winners be determined as part of this project? If grant winners have already been identified, can you provide additional information on their grant? (IE: purchasing EV buses, purchasing/installing solar, etc.)
 - **This is irrelevant to CPC Climate's portion of the program, which is the decarbonization of multifamily housing throughout the country. "Areas" are not being awarded grants. CPC will identify borrowers for its direct loan program and loan purchase program based on the Program's eligibility criteria.**
 23. Is there a specific timeframe that CPC envisions requiring project management services for its project plan implementation?
 - **We envision these services lasting throughout the period of performance, with the most time allocated in the first 1-2 years.**
 24. Please advise on when CPC anticipates making its first award/investment?
 - **The timing is not yet final but if we are in contract with Climate United by July/August, we would anticipate making our first loan by August/September.**
 25. Has it been determined what reporting platform will be used for the CUF coalition and whether CPC's subrecipients will be entering data directly into that platform or if CPC will have its own platform?
 - **The reporting platform has not yet been determined for CUF nor for CPC Climate's borrowers.**
 26. Should the bidders assume that design and implementation of reporting, including establishing reporting requirements for CPC's subrecipients, collecting reporting, and

submitting reports to CUF, are part of the scope that should be priced since these are integral inputs to compliance?

- **Yes**
27. Please clarify whether the following task should be priced to include operating the compliance functions that will be designed in the following task: Work with leadership to develop an overall compliance strategy to comply with all EPA obligations, provide project management services to assist with the implantation of such strategy, develop and/or review internal policies and procedures, assist with the creation of a training program, train internal staff, identify best practices for on-going management of compliance functions, and perform certain other functions related thereto (including procurement and Davis Bacon compliance). If yes, what is the anticipated period of performance for operating compliance functions under this contract?
- **Yes, the award period of performance is 5-7 years. We anticipate requiring more services in the first 1-3 years than in the latter years but services will be required throughout.**
28. Would CPC confirm whether there is a draft operating model that will be provided for review at the start of the contract?
- **Yes, confirmed.**
29. For the Managed Services Menu, is CPC asking: for the offeror to include a proposed menu of managed services in its response; and/or for the offeror to include in its technical response scope to develop a menu of managed services (including key scoping parameters such as scale, terms & conditions) such that the menu of managed services is a deliverable of the contract v. included in the response itself.
- **The former.**
30. Will CPC confirm that it is not a requirement and will not count against a bidder to not disclose team members' race and sexual orientation?
- **Confirmed.**
31. Please confirm whether CPC would like each bidder to provide client references for similar work, and if so, please indicate how many client references.
- **If the respondent advances to the next stage, CPC will request client references at that point.**
32. How many second-tier subawards does CPC envision? Will CPC require assistance by the offeror to create the second-tier subaward agreements?
- **Two - specifically for predevelopment and market building and yes, CPC will require assistance with oversight but will not require consultant to create the subaward agreements (CPC's attorneys will handle the agreements).**
33. Will CPC provide any specific milestones that offerors should consider when proposing the recommended timelines?
- **CPC anticipates that the Program will run for 5-7 years. The first closings are expected in late summer/early fall. The Compliance and reporting program need to be put in place in the short term.**
34. Will CPC Climate Capital LLC provide a list of the current policies and procedures?
- **Yes**

35. How many current policies and procedures does CPC Climate Capital LLC have implemented?
- **There are currently 16 policies and procedures in draft form.**
36. What type of agreement should we expect to see if we win this award? Can we review the terms and conditions during the proposal phase or are the terms in Attachment A the complete set of terms & conditions?
- **We envision entering into a Consulting Agreement/Master Services Agreement which we will share with the winning bidder once procured.**
37. Recognizing that you received notification of the award on April 4, where are you in the award acceptance process? What kind of help do you need with negotiations?
- **Climate United is in the process of negotiating the terms and conditions with the EPA. In all likelihood, negotiations with the EPA will be finished by the time this engagement commences but CPC Climate anticipates requesting help from the respondent when negotiating the subrecipient agreement with Climate United.**
38. Can you provide more detail about CPC Climate Capital's role and contractual structure in the Climate United Fund coalition as well as more detail about the role of Self Help Climate Capital?
- **CPC Climate was part of the coalition application that Climate United submitted to the EPA and will be administering a portion of the grant award as a subrecipient of Climate United. Climate United is the recipient of the award and will enter into the direct contract with the EPA. Self-Help will have the same legal relationship to Climate United that CPC Climate will have, although that is not relevant to this RFP or scope of work.**
39. Are interviews planned to be in-person or virtual? If in-person, where?
- **Interviews will be held on an as-needed basis with candidates of interest and will be virtual.**
40. The deliverable with respect to "Advising on contract negotiations with CUF...". Is this in support of contracts between CUF and CPC or in support of the CUF coalition and third-parties?
- **Contracts between CUF and CPC.**
41. Approximately how many staff are anticipated to be trained by function (accounting, procurement, etc.)?
- **CPC Climate Capital will retain all decision-making authority, so this depends on how much can be outsourced.**
42. The RFP focuses on management consulting services for CPC Climate to meet GGRF needs. Does that encompass the actual implementation of a technology platform to capture GGRF pipeline, processes, data and impact, or will that be a separate RFP process?
- **The consultant will provide an assessment of the pros and cons of different implementation strategies and CPC Climate will make a determination based on that assessment.**
43. If we were to win this Management Consulting RFP, would we then be excluded from bidding for the Technology System RFP down the road? Or would there be a conflict of interest?

- **It is undetermined whether or not there will be a separate technology RFP down the road.**
44. Regarding the development of a detailed implementation plan, can we assume that if we are to receive this award, our consultants will be able to conduct detailed design sessions with relevant CPC Climate staff?
- **Yes, and please recommend the number of design sessions you envision. These can be remote.**
45. Regarding “support services to implement such a plan” and “the ability to take on certain managed services on either a temporary or permanent basis (as needed),” does this mean the ability to implement the human and technological changes required by the GGRF...?
- **Yes, it means the ability to implement the GGRF compliance program.**
46. When you mention managed services in the areas of IT, grant management systems, procurement, reporting and compliance, are you expecting the RFP awardee to essentially fill in these roles and manage these processes in coordination with CPC Climate? Or more provide advice/consulting services in these areas?
- **The former. We are specifically looking for temporary staff, augmentation of existing team, and staff for these functions (at least at first/temporarily). As noted, CPC Climate Capital will retain all decision-making authority associated with any strategic or compliance decisions.**