



HBCU Promise+ Legacy Program

REQUEST FOR ENERGY CONTRACTORS

June 11, 2026

1. GENERAL INFORMATION.

- A. **Opportunity & Overview.** The Center for Community Self-Help (“Self-Help”) seeks to identify energy advisory services experts and energy solutions contractors to assist Self-Help in its technical assistance services to HBCUs and for referrals to HBCUs for future direct services, as further described below.

This Request for Proposals (the “RFP”) will remain open at least until the deadline noted in Section 4D and responses (each a “Proposal”) will be evaluated as set forth in Section 4. Self-Help reserves the right to extend the submission period. For the purposes of this RFP, parties responding to this RFP are referred to as “Proposer” or you.

Proposals must be submitted electronically in accordance with Section 4 below.

- B. **Background: Self-Help as a Trusted Partner in Preserving HBCU Assets.** As the largest Black-run institutions and employers in many cities, Historically Black Colleges and Universities (“HBCUs”) are essential institutions—educational anchors, economic engines, and cultural beacons—especially in Black communities. Yet, many face serious financial threats: rising costs, underfunding, small boards, and limited political support. Recent federal actions limiting education spending and the prospect of further lost financial and goodwill support puts HBCUs at existential risk institutionally, puts the people who work at and benefit from these institutions at personal economic risk, and jeopardizes the stability of communities that could lose access to a significant pathway to economic mobility, public health and healthcare, and education. Half of all remaining HBCUs are private and face acute precarity should access to public funds become more restricted. While the entire HBCU educational sector is at risk of financial hardship, closure, merger, or accreditation risk, the risk is especially acute for private HBCUs, which are more tuition-dependent (i.e., 30% of private college revenues come from tuition versus 16% for public colleges)—and thus, less elastic to changes in enrollment—and have fewer financial buffers. From a people perspective, the risks are particularly acute for students who are first generation to attend college and those whose families have low wealth, as well as private HBCUs. Despite these challenges, hope remains. Application rates have climbed, and demographic trends show promising potential (e.g., U.S. Census (2022) and IES projections that K-12 students of color will be the majority of college-aged young adults shortly; untapped demand achieved by closing the gender gap in Black student college enrollment). More Black

and non-White students may choose HBCUs for their affirming cultural environments and capital maximization mission (Silvanus Wilson, 2023). The question now is how to support HBCUs in surviving and thriving to capitalize on the demand. Self-Help is well positioned to support this future.

Why Self-Help has extended its HBCU Promise+ Center of Excellence efforts. Self-Help is a family of affiliated nonprofits, which includes the Center for Community Self-Help, Self-Help Credit Union, Self-Help Federal Credit Union, Self-Help Ventures Fund, and the Center for Responsible Lending. Self-Help has a 45-year history committed to our mission: to create and protect ownership and economic opportunity for all, especially people of color, women, rural residents and low-wealth families and communities.

To achieve mission impact, Self-Help staffers engage in community-based advocacy (e.g., against payday lending, supporting consumer protections), partnership, and ecosystem lending to disrupt economic inequalities. As a family of nonprofits, we have provided over \$12 billion in financing to help more than 170,000 borrowers buy homes, start businesses, and strengthen community resources. Self-Help now has credit union branches in 10 states – four of which have the largest numbers of HBCUs and HBCU students in the country (i.e., NC, GA, SC, FL). Furthermore, Self-Help branches are located within a 30-minute drive from 22 HBCUs! This means that HBCU communities are our communities – they are the communities we aim to serve.

Ownership and economic opportunity depend on education, financial literacy, and capital access. Self-Help launched the HBCU Promise+ Initiative in 2021 to expand the range of affordable resources available to HBCU community members as well as the pathways available for career exploration, financial literacy, and advocacy. We also listened to HBCU Presidents who told us that they need: (a) access to affordable capital for projects and operating expenses; (b) technical assistance that extends their capacity for long-term strategic innovation, growth, and advancement management; and (c) support amplifying pathways to ownership for their stakeholders. In 2025, Self-Help expanded the initiative with the HBCU Promise+ Center of Excellence and its HBCU Legacy Program 3-part programmatic focus:

Purpose. Self-Help is a recipient of a grant from the Robert Wood Johnson Foundation (“RWJF Grant”) to support the preservation of HBCU campus assets and the ongoing legacy of these storied institutions, undertaken under the Self-Help HBCU Promise+ Legacy Program. Self-Help seeks to formally engage leading experts in the clean energy sector to support the energy modernization needs at a small set of specific Cohort Schools in the Southeast, on ancillary land holdings of Cohort Schools, and to engage *across the cohort of schools* to explore jointly shared energy modernization opportunities that support campus and community needs. We seek energy deployment experts to assess campus and cohort needs and advise on opportunities and pathways for clean energy investments with existing energy technologies (e.g., solar, batteries, energy efficiency improvements to campus buildings, charging stations for EV infrastructure, geothermal technology integration). . See the Scope of Work below for more details.

Self-Help expects to use proceeds from the RWJF Grant to pay for all or a portion of the energy

advisory services and related fees in accordance with any terms of such grant and all other applicable requirements.

- C. **Limitation.** Self-Help reserves the right to (a) reject any or all Proposals without explanation, (b) waive technicalities or irregularities, (c) request additional information from any Proposer (including a list of client references), (d) withdraw or revise this RFP at any time, (e) make such selection deemed in its best interest (in Self-Help's sole and exclusive discretion), and/or (f) enter into due diligence discussions with multiple successful Proposers. Upon completion of due diligence review, Self-Help may negotiate individual contracts with certain selected Proposers following counterparty review and based on program fit, not necessarily the lowest pricing.

The issuance of this RFP does not commit Self-Help to participate in any transaction, proceed to negotiate any terms or definitive documentation, pay any costs incurred in preparing a Proposal or to procure or contract for services or supplies. The selection of your Proposal under this RFP does not commit Self-Help to enter into an agreement or conduct or expand business with any Proposer even if all the requirements are met.

Self-Help anticipates beginning receipt of services upon completion of the RFP process and execution of a written agreement between Self-Help and successful Proposer.

2. **SCOPE OF SERVICES.** Selected Proposers will provide Self-Help with the following services that develop a cutting-edge energy model for individual Cohort School campuses and across the cohort of schools for campus modernization, revenue generation, and community energy needs. Services provided will include but may not be limited to:

Campus-specific energy modernization support

- *Types of advisory services and expertise we are looking for:*
 - Expertise in clean energy technology deployment (e.g., fleet electrification, resilience hubs, building decarbonization, solar, standalone power, wind, virtual power plants)
 - Preliminary energy audit and facilities evaluations, including utility rate analysis
 - Assessment of building upgrade opportunities to identify operating savings and enhance health, safety, and energy improvement (including air sealing, insulation, building management systems, lighting efficiency, heat pumps for space conditioning, dehumidification, water heating and clothes drying)
 - Technical energy investment analysis, scenario plans, and engineering feasibility assessment
 - Expert advising on non-extractive energy financing vehicles and opportunities to fund energy infrastructure investment capital for new campus energy installations (e.g., new solar and standalone power equipment), to modernize existing campus energy platforms (e.g., HVAC, water, power installation, credits offtake and services agreements), provide project bridge funding, and reduce downstream project costs (e.g., tax credits)
- *Range of deliverables to be informed by that expertise:*
 - Building Upgrades for health, safety and energy improvement, including, air sealing,

insulation, building management systems, heat pumps for space conditioning, dehumidification, water heating and clothes drying

- Innovative real estate assets utilization and energy planning scenarios that support increased operational stability and growth
- Measurement and verification of reduction in energy use and expenditures
- Periodic review of energy systems operations (e.g. retro-commissioning)

Cohort collaborative energy modernization project support

- *Land use*
 - Innovative real estate assets utilization and energy planning scenarios , in coordination with engaged real estate development experts, for new joint ventures across Cohort Schools that leverage advancements in energy and climate technologies to increase operational stability and growth for all participating schools
- *Combined multi-stakeholder purchasing & other actions*
 - Expert advising on joint energy venture revenue opportunities, such as examples of shared profits engagements (e.g., reinvested into the project in addition to being distributed directly to participating entities) and Energy Service Contracting (ESCO), in which companies provide technical know-how and financing for upgrades with savings shared with the schools..
 - Identifying leading innovators who can lead the stand-up, technological deployment, and commercialization of innovative and emerging energy technologies (e.g., HBCU Virtual Power Plant & DER). Please identify if you have the organizational capacity to not only identify the range of providers and offer recommendations to match Cohort School needs but to also offer Cohort Schools preferential pricing for leading the RFQ process.
- *Modernization*
 - Innovative energy planning scenarios that meet campus modernization and financial resilience needs as well as the power needs of the surrounding community (e.g., HBCU Virtual Power Plant & DER).
- *Financing*

3. **PROPOSAL CONTENTS.** The Proposer shall clearly and concisely respond to each of the following subsections (referencing the corresponding section A-H). Failure to respond to a topic may render the Proposal incomplete and Self-Help reserves the right, in its sole discretion, to either contact Proposer to request supplementation of the Proposal or refuse to consider or evaluate the incomplete proposal.

A. **Qualifications & Experience.** Describe your qualifications and experience related to the areas outlined in the Scope of Services above in Section 2, and Minimum and Preferred Qualifications below in Section 3. Include metrics that demonstrate the range and scope of your team's expertise and experience in provision of the services in Section 2 above, e.g., number of clients, anonymized description of the nature of the client engagement(s), capacity, and timeline. Special attention should be given to enumerating the experiences related to colleges/universities and other social enterprises or nonprofit entities.

B. **Organization, Size, Structure.** The Proposer should briefly describe its organization in terms of the following:

- Overall size and number of staff within Proposer organization specializing in relevant

areas of expertise. Please include in the submission:

- Description of staff's qualifications and roles
- Description of customer service model, including methods of communication with clients
- Relevant office locations
- Major business relationships (within the last 3 years) relevant to the Services sought
- Other details you deem reasonable and material for evaluating the Proposal.

Self-Help encourages the participation of businesses owned by people of color, women, and persons with disabilities in the implementation and execution of all projects, either on a direct basis or through sub-contracting efforts.

Please confirm whether you are aware of any actual or apparent conflict of interest arising from this proposed engagement.

C. **Minimum Qualifications.** Document how you meet the following qualifications.

Required

- Capacity to advise and manage energy upgrades including assessment, project oversight, vendor selection and quality assurance
- Knowledge of and experience with applicable utility rate tariffs, rebates and incentives
- Capacity to provide at least 1 staff member onsite during each in-person convening (i.e., 2 place-based convenings per year in the 2-year program) to listen to and engage with Cohort Schools
- Ensure any subcontracted providers perform agreed services Billing management in accordance with Self-Help and RWJF Grant requirements
- Annual compliance with business requirements in North Carolina and/or South Carolina
- Monthly reporting for all HBCU Cohort engagement types and billing bases

Preferred

- Dedicated relationship manager for HBCU Cohort advisory services
- Provide opportunities for students to participate in analysis and planning for energy improvements

D. **Pricing.** Describe your pricing and structure. Pricing should be within the standard industry ranges for each item, including any billing minimums and billing bases, any periodic minimum fees, and any other fees.

E. **Cybersecurity and Breaches.** The Proposer should disclose and concisely describe its cybersecurity policies and procedures to protect client data. If the Proposer has suffered any known cyberattacks or breaches, please describe the event and the organization's response and remedial actions taken. Please include a copy of your Data Privacy and Cybersecurity Policy.

F. **Insurance.** Describe the levels of coverage for liability insurance, cyber insurance, Financial Institution Bond (or equivalent insurance), Errors and Omissions Insurance, and any other relevant insurance your organization maintains.

G. **Contact Information.** The Proposer should include the name, title, mailing address, email

address, and telephone number for the primary point of contact of the Proposer.

For all signatures, please use an electronic image of a wet signature (e.g. a scanned pdf) or a digital signature.

4. PROPOSAL EVALUATION

- A. **Submission of Proposals.** Submit Proposal, including all supporting documentation, electronically in a single PDF of 50 pages or less, plus required attachments to: shandra.jones@self-help.org. Include the RFP name and your organization name in the subject line of the submission email.

Self-Help is not responsible for electronic files that cannot be opened or corrupted files. If files cannot be opened, Self-Help reserves the right (but does not have the obligation) to contact the Proposer and take reasonable measures to receive an openable file. Submissions must not be password protected or have any type of restriction applied to the file or contents. By submitting information, the Proposer represents that they have read and clearly understand this RFP and are capable of providing the required services.

All costs incurred in the preparation of a proposal responding to this RFP and/or participating in any interview process will be the responsibility of the Proposer and will not be reimbursed.

- B. **Evaluation Procedure and Criteria.** Self-Help will review proposals against initial criteria, including:

a. First-tier evaluation metrics:

- Responsiveness to RFP
- Prior relevant experience
- Operational processes
- Reporting capabilities
- Price reasonableness

b. Second-tier evaluation metrics

- Interviews (if conducted)
- Potential reference checks following interviews and
- Publicly available information and Reputational Risk

Self-Help will review all Proposals based on first-tier evaluation metrics, and based on that review, may select a smaller number of Proposals for second-tier evaluation metrics. Any evaluation or scoring of first-tier or second-tier evaluation metrics is subject to correction upon discovery or disclosure of additional or clarifying information. All responses must be presented economically and efficiently. Self-Help may request additional due diligence materials and interviews with the Proposer as part of the selection process. Self-Help's decision regarding this RFP will be final and not subject to review.

- C. **Terms of Engagement.** Self-Help intends for this RFP to result in the selected Proposer executing a written agreement with Self-Help. The contract will be on a lump sum, fixed price, or cost reimbursement ("not to exceed") basis, with payment terms to be negotiated with the

selected Proposer. Any such agreements with the selected Proposer will (a) be contract agreements, not subrecipient agreements, (b) comply with the requirements set forth for regulated mission-based financial institutions and community development financial institutions (CDFIs), and (c) be for a term of one year, with option for renewal for up to an additional one individual year, or as otherwise mutually agreed. Proposers must be amenable to including in a contract any information provided in its response to this RFP or developed subsequently during the selection process. The selected Proposer agrees to be bound by all applicable Federal, state, and local laws, regulations, and directives in the performance of such contract.

- D. **Timeline.** Self-Help expects to follow the timeline set forth below with respect to this RFP; provided, however, that Self-Help may extend (but not shorten) in its sole discretion any or all of the timelines set forth below:

Release of RFP	June 15, 2026
Proposer Questions Due to Self-Help	11:59 P.M. ET on June 23, 2026
RFP Proposals Due to Self-Help	11:59 P.M. ET on June 13, 2026

Optional. To support clarity about this request and increase equity in access to this opportunity, our staff is excited to host an information session during which we will describe the HBCU Promise+ Legacy Accelerator Program, the scope of the energy modernization aims within the Legacy Accelerator Program, and the expert energy consultant and technology advisor needs.

Energy RFP Information Session | Tuesday, June 23, 2026 from 2:00-3:00pm ET
Registration Link provided upon request

Information session attendance is **optional** and is **not** a prerequisite for proposal submission.

5. QUESTIONS AND CONTACT INFORMATION

Please submit any questions, per the timeline specified above, concerning this RFP and include the name of the RFP and organization in the subject line, to the following email address:
shandra.jones@self-help.org.

Direct communication about the content of this RFP will be limited. Self-Help will receive written questions from potential Proposers submitted via email. If appropriate, and for clear and consistent communication, the question (without identification of the questioner) and its answer will be posted to the FAQ on our website here: <https://www.self-help.org/who-we-are/resources/current-proposal-requests>

Self-Help reserves the right not to respond to all questions. Each Proposer is responsible for requesting further explanation, if they do not fully understand or believe the information contained herein could be interpreted in more than one way.

Self-Help looks forward to receiving your Proposal.

END OF DOCUMENT