

**MONTGOMERY COUNTY GOVERNMENT**  
**Office of Grants Management**  
**Notice of Funding Opportunity (NOFO)**

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**Program Summary:** Montgomery County’s Department of Environmental Protection (DEP) and Office of Grants Management (OGM) are soliciting grant applications for the County’s Low- to Moderate-Income Housing Electrification Project in Montgomery County, Maryland, which will replace fossil fuel-fired appliances and HVAC systems with more cost-effective, energy-efficient, and comfortable electric technologies that will upgrade existing equipment in affordable housing, reduce energy burden, and improve indoor air quality for low- to moderate-income tenants and building owners. This is a Federally funded grant program from the U.S. Department of Energy (DOE), and the selected partner will be required to meet all Federal reporting, financial, and other compliance requirements as a grant sub-recipient. A total of approximately \$1,800,000 will be made available to an eligible nonprofit housing provider for a period of four years. DEP and OGM will hold a virtual Information Session on the date indicated below to give eligible and interested applicants the chance to ask questions about the solicitation and receive guidance on completing the application.

**Key Program Dates:**

- **Program Opens for Applications:** Thursday, November 7, 2024
- **MS Teams Live Online Grant Program Information Session:** Friday, November 15, 2024 at 11:00 AM-12:00 PM
- **First Stage/Eligibility Screening Submission Deadline:** Thursday, November 21, 2024 at 11:59 PM
- **Response on First Stage/Eligibility Screening:** Monday, November 25, 2024
- **Second Stage/Full Application Submission Deadline:** Thursday, December 19, 2024 at 11:59 PM
- **Anticipated Grant Agreement (following Federal review and approval):** February/March 2025

**Key Program Resources:**

- **Online Grants Application Platform:** <https://mcmdgrants.smapply.org/>
- **Program Page:** <https://mcmdgrants.smapply.org/prog/FY25LMI-Electrification>
- **Information Session:** [Link to join the event live or view its recording](#)

**Grant Program Details, Submissions, and Support:** Application details can be downloaded, and the application may be submitted through the Online Grants Application Platform through the links above. Applicants requiring an Americans with Disabilities Act (ADA) accommodation should contact the Office of Grants Management to discuss alternative submission options. Applications that are incomplete, do not meet legal requirements, or are submitted after the deadline will not be accepted. For questions, technical support, or for alternate ADA submission options please contact the Office of Grants Management using the contact information below:

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# SECTION I – GRANT PROGRAM INFORMATION

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## A. Background

The Department of Environmental Protection (DEP) and the Office of Grants Management (OGM) are soliciting grant applications for the County’s Low- to Moderate-Income Housing Electrification pilot program in Montgomery County, Maryland (Award Number DE-EE0010702), which will replace fossil fuel-fired appliances and HVAC systems with more cost-effective, energy-efficient, and comfortable electric technologies that will upgrade existing equipment in affordable housing, reduce energy burden, and improve indoor air quality for low- to moderate-income (LMI) tenants and building owners. The pilot will include competitively selecting an affordable housing partner(s) as grant subrecipient(s) that can deliver one of two possible outcomes: (a) a community of affordable single-family units will have at least 30 units converted to all-electric appliances; or (b) one or more multi-family buildings, consisting of at least 15 total units, converted to all-electric appliances and systems. The County prefers to select one subrecipient for this project but is open to multiple subrecipients. The County aims to maximize the number of total units converted under this grant.

This pilot project(s) will directly inform the level of effort and costs required to electrify other fossil fuel-fired low-income housing units in Montgomery County and elsewhere in Maryland, in line with the County and the State’s climate action goals as the electricity grid uses cleaner energy over time. It aims to demonstrate through a Final Report/Case Study that electrified technologies are market-ready, cost-effective, energy-efficient, comfortable, require less maintenance, and create safer and healthier homes. In addition, this project will highlight that there is a rapidly expanding market in need of a qualified workforce to advance these electrification projects.

This Federal grant opportunity aligns with [Montgomery County’s Climate Action Plan](#), which identifies the top climate hazards faced by County residents, as well as actions that will address the County’s declared climate emergency. Through the Low- to Moderate-Income Housing Electrification pilot demonstration project, the County seeks to directly implement strategies that ensure LMI residents’ homes are safe, healthy, efficient, and electrified—while identifying best practices and lessons learned that other affordable housing communities can apply to future electrification retrofits. **Ultimately, this grant solicitation seeks to select a non-profit housing partner with eligible housing communities that are ready to electrify. The grant opportunity will be offered in two stages – the First Stage is an Eligibility Screen, and the Second Stage is a Full Application.**

## B. Target Population

The target population for this grants program is LMI residents who reside in affordable housing communities (i.e., households that have an income at or below 85% of the Area Media Income for Montgomery County). The grant recipient must outline in their application how participant eligibility will be verified.

## C. Eligible Organizations

Applicants must meet all the following conditions:

- The organization must have a federal 501(c)(3) tax-exempt status.

- The organization must be registered to perform home upgrade work in the state of Maryland (i.e., MHIC licensed contractors) AND/OR have the capacity to procure MHIC-licensed subcontractors prior to performing upgrade work.
- The organization must be currently registered and in Good Standing with the Maryland State Department of Assessments and Taxation (SDAT).
- Recipients of home upgrades funded by this grant program must be located in Montgomery County, Maryland.
- Current Montgomery County contract or grant award winners must be current on all reporting obligations for other awards, and those reports must reflect substantial progress towards the goals of their awards.
- Proposed expenses must be for a new activity, expansion of existing activities, or a combination of both.
- Applicants may only submit one application per organization under this NOFO.

#### **D. Funding Priorities**

Under this Federal grant award, the County seeks to award a sub-grant to a non-profit housing provider that operates affordable housing communities in Montgomery County that are currently using fossil fuels and that wants to take action to electrify those energy end-uses. Preference will be given to non-profit housing organizations located in Montgomery County, but organizations headquartered outside of Montgomery County are eligible as long as they own and operate eligible affordable housing communities in Montgomery County.

The County is seeking to attain one of two possible outcomes: (a) a community of affordable single-family units will have at least 30 units converted to all-electric appliances; or (b) one or more multi-family buildings, consisting of at least 15 total units, converted to all-electric appliances and systems. The County aims to maximize the number of total units converted under this grant.

Montgomery County seeks proposals that apply a racial equity lens and demonstrate cultural proficiency and inclusivity of LGBTQIA+ community members.

#### **E. Eligible Expenses and Illustrative Activities**

Eligible expenses under this grant program include capital, construction, and operating costs. Capital expenses are one-time costs of \$5,000 or more in value that cover the purchase or significant improvement of a fixed asset. Operating costs are defined as costs that support ongoing expenditures associated with projects over the grant performance period.

Preference for award will be given to proposals that maximize upgrades and capital improvements that align with program goals.

Grant funds may not be used for the following:

- Any purchase or activity which has already been made outside the grant award period of performance.
- Purchases or activities unnecessary to accomplish grant purposes.
- Prior obligations of and/or, debts, fines, and penalties imposed on the Grantee.
- Lobbying.
- To supplant (replace) funds from other grant sources.
- To fund activities/renovations outside of Montgomery County, Maryland
- These grants are generally not intended to fund consumable items. Care should be taken

to install highly efficient items that do not create onerous ongoing expenses for residents (e.g., expensive ongoing maintenance; increased utility bills).

- Installation of, or integration with, fossil fuel appliances. The intent of this grant project is to entirely replace fossil fuel appliances with efficient electric counterparts. For example, dual-fuel heat pumps with fossil fuel backups are not eligible.
- Gut rehabilitation or major structural repairs not related to electrification upgrades (e.g., unsafe foundation, collapsed floor/roof).
- Repairs covered by homeowner’s or flood insurance.
- Repairs needed due to willful damage or negligence on the part of the owner/occupant.
- Cosmetic-only improvements unrelated to the electrification upgrades (e.g., interior or exterior painting).
- Repairs to detached garages, barns, sheds, or storage buildings.
- Expenses not permitted by Federal purchasing regulations (CFR Part 200).

**Illustrative activities** (and their corresponding requirements) that may be funded under this program include but are not limited to:

Type	Description and Requirements
<b>Electrification of heating/cooling systems and domestic water heating</b>	Replacement of fossil fuel heating system(s) with heat pump(s) (conventional ducted, mini-split, cold-climate) that are CEE Tier 1 and/or ENERGY STAR certified. Cold-climate heat pumps must be ENERGY STAR Cold Climate rated. The heat pumps (optionally with electric auxiliary heat) must carry the entire heating/cooling load of the dwelling. Water heaters must be all-electric, and ENERGY STAR rated.
<b>Electrical panel upgrades</b>	Electrical panel “heavy up” to enable electrification of space heating, water heating, cooking, and any other fossil-fuel-fired appliances and systems.
<b>Electrical modernization</b>	Replacement of knob and tube electrical wiring or branch circuit aluminum wiring to enable weatherization and electrification.
<b>Chimney repair/removal</b>	As needed for health and safety when related to electrification upgrades.
<b>Interior repairs</b>	Interior finish repair or replacement (walls, ceilings, floor coverings) up to 50% of total wall area if required from electrification upgrades. Must replace a like finish. Does not cover damage due to negligence or willful damage. Floor repair (framing and/or subflooring). Cosmetic-only repairs are not permitted.
<b>Dehumidifiers</b>	Room or permanently installed units, plus related controls to maintain the relative humidity below 60% in basements, crawl spaces and other areas that cannot be adequately dehumidified by the central HVAC system(s).

- The grantee will be required to verify that any work undertaken and paid for through this grant is not covered by homeowner’s or flood insurance.
- The grantee will be required to obtain all applicable permits from the relevant permitting authorities, such as the Montgomery County Department of Permitting Services, the Washington Suburban Sanitary Commission, or any other applicable permitting authority prior to commencing work.
- To the greatest extent practicable, all equipment and products purchased with funds made available under this Award should be American-made.

- All rehabilitation or construction work will have to be preceded by site assessments that are adequately documented by narrative and photos to justify the work plan. Specifically, the grantee must:
  - provide site assessments and installation services for eligible projects in a timely fashion.
  - provide assessments to evaluate a site’s suitability for eligible technologies, including any structural, electrical, plumbing or mechanical issues.
  - make energy savings estimates for building envelope improvements when heating systems are recommended, completing heating/cooling load calculations using industry best practices and Air Conditioning Contractors of America (ACCA)-approved software for electrification upgrades (e.g., Manual J).
  - abide by the terms and conditions per the County’s Federal grant agreement.

### **F. Award Information**

Montgomery County Government anticipates awarding approximately \$1,800,000 through one or more awardee(s). The final amount will be dependent upon grant activities and final negotiation and may be lower or higher than the amount indicated but will align with the County’s Federal grant agreement. The duration of any grant award under this solicitation is expected to be four calendar years (48 months), contingent on satisfactory performance and funds availability. The estimated start of grants awarded under this solicitation is expected to be no later than April 1, 2025, dependent on DOE’s approval of the County’s sub-recipient on this grant. The resulting awards are anticipated to be reimbursement-based per successful completion of milestones and submission of reports as outlined below. This Grant Program does not commit Montgomery County or DOE to make any awards.

Based on the County’s Federal award approved budget and timeline, the chosen partner is expected to adhere to the following over the course of the four-year (48-month) performance period:

- 4/1/2025-3/31/2026 / Budget Period 2 (\$187,998): Plan and Design Conversions
- 4/1/2026-3/31/2029 / Budget Period 3 (\$1,631,817): Plan and Design Conversions; Construction; Contribute to Final Report/Case Study

Per the Federal grant agreement, DOE reserves the right to recommend redirection of work under this project, place a hold on Federal funding, or discontinue funding of the project due to insufficient progress, change in strategic direction, or lack of available funding. In the event the DOE takes any such action, any agreement between the County and the subgrantee arising out of this NOFO may be terminated by the County at the County’s sole discretion and at no further cost or expense to the County.

### **G. Reporting Requirements**

After an initial kick-off/compliance orientation meeting, the grantee will receive payment based on the submission and approval of quarterly programmatic and financial reports to the County and reimbursement from DOE. The financial report template will be provided by the County and reflect project expenses incurred during the relevant period of performance. The programmatic report template will also be provided by the County and include, as applicable:

- A summary of work, including milestones achieved and obstacles encountered during the previous month.
- Documentation showing project completion (e.g., product registration documentation, finalized permits, geotagged before and after photos of completed work, including serial numbers for appliances/equipment, AHRI certificates for heat pumps and heat pump water heaters).

Organizations should expect to report on the Performance Plan as a grant requirement as well as have monthly check-ins with Montgomery County Government staff, as well as DOE project management staff as requested. The County also reserves the right to conduct visits to the site(s) where grant funds are deployed (with resident approval).

The awards resulting from this grants program will be cost-reimbursable based on compliance with Federal reporting requirements. Applicants should demonstrate the ability to manage cost-reimbursable awards and/or commitment to maintain sufficient liquidity to conform to grant agreement requirements of a Federally cost-reimbursable award. For cost reimbursable awards, the County will make payments 30 days after receipt from DOE.

## H. Submission Guidelines

**The Low-to-Moderate-Income Housing Electrification Pilot Grants Program will use a multi-stage application process.** In the First Stage/Eligibility Screening, applicants will submit basic organizational details and summary information that broadly outlines their eligibility, proposed eligible affordable housing communities, and ability to fulfill the terms of the Federal grant requirements. DEP and OGM will review the First Stage/Eligibility Screening submissions and determine eligibility as well as provide feedback either encouraging or discouraging applicants to participate in the Second Stage/Full Application of the grant program process. The second stage will involve a much more rigorous set of tasks that detail the scope, budget, timeline, performance plan, and overall ability to meet Federal implementation requirements.

Applications must be submitted through the Montgomery County Office of Grants Management - Grants Application Platform through the links posted on the first page of this document. Once the applicant clicks on the link, they will be prompted to create an SM Apply account, select the Low- to Moderate-Income Housing Electrification Pilot Grant Project, and then will be able to access the grant application. Applicants requiring an Americans with Disabilities Act (ADA) accommodation should contact the Office of Grants Management to discuss alternative submission options.

**First Stage/Eligibility Screening applications are due no later than Thursday, November 21, 2024 at 11:59 PM. Second Stage/Full Applications are due no later than Thursday, December 19, 2024 at 11:59 PM.** All applications will be recorded upon receipt. Applications received after the deadline will be disqualified and will not be considered for funding. Any additions or deletions to an application, unless requested by the Office of Grants Management, will not be accepted after the deadline. Applications with incomplete, illegible, or corrupted digital materials will not be considered.

## I. Information Session

An Information Session will be held on **Friday, November 15, 2024 at 11:00 AM-12:00 PM**. The MS Teams link to participate in the Information Session live or to view an event recording afterwards can be found on the first page of this document as well as on the

grants program application page.

## **J. Application Review & Awards**

First Stage/Eligibility Screening applications will be reviewed by OGM and DEP staff overseeing the implementation of this Federal grant award.

To review Second Stage Full Applications, Montgomery County Government will recruit an independent Review Committee that will develop and submit recommendations for funding. The Review Committee will be composed of neutral, qualified individuals from Montgomery County Government, and possibly the broader Montgomery County community, selected for their experiences in the grant program's subject area, grants administration, project management, and/or ability to analyze programs from a Racial Equity and Social Justice lens. The panel members will review and score applicant proposals based on the criteria outlined in this program and submit recommendations for awards. Final decisions will be made based on the scores and such other factors and considerations as the County deems relevant at the time of award. These may include updated consideration of how well the applicant has performed on prior programs, the expert opinion of grant administrators who have prior experience with applicants, updates to priorities, or other factors.

## **K. Award Notification**

First Stage/Eligibility Screening applications will be notified whether their applications are encouraged, discouraged, or ineligible via email approximately 10 business days after the First Stage/Eligibility Screening application deadline.

For the Second Stage Full Applications, award notification letters are expected to be released approximately one month after the application deadline via email. Grant Agreements are contingent on DOE approval per the Federal grant agreement. For successful applicants, the Grant Agreement will contain the total amount awarded and funding restrictions; programmatic, administrative, and policy requirements; reporting requirements; and payment terms.

## **L. Terms and Conditions**

- County reserves the right to accept or deny any or all applications if the County determines it is in the best interest of the County to do so. The County shall notify the applicant if it rejects that applicant's proposal. The County reserves the right to suspend or terminate an outstanding Grant Program.
- The County reserves the right to issue addenda and/or amendments subsequent to the posting of a Grant Program.
- The County shall not be liable for any costs incurred in the preparation of applications in response to the Grant Program. Applicant agrees that all costs incurred in developing the application are the applicant's sole responsibility.
- The County may conduct pre-award on-site visits or request additional information to verify information submitted in the application and to determine if the applicant's facilities are appropriate for the services proposed.
- The County may enter negotiations with an applicant and adopt a firm funding amount or other revisions for the applicant's proposal that may result from negotiations. The County shall provide the citations to the statute and implementing regulations that authorize the grant or sub-grant; all applicable federal, State, and County regulations; payment provisions identifying how the grantee will be paid for performing under the award; reporting requirements, including programmatic, financial and any special reports required by federal, state, or County law and/or the



granting department; and compliance conditions that must be met by the grantee. If there are any conflicts between the terms and conditions of the Grant Program and any applicable federal, State, or County law or regulation, or any ambiguity related thereto, then the provisions of the applicable law or regulation shall control, and it shall be the responsibility of the applicant to ensure compliance.

## **SECTION II – APPLICATION TASKS**

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Applicants are required to follow the content requirements and submission instructions listed within the online application platform and NOFO document. Please submit your proposal, as broken out by each of the Tasks, by filling out the data fields or uploading documents where applicable. Uploaded documents should have clearly titled sections and sub-sections. Document uploads should ideally be submitted as PDF documents with budgets uploaded as MS Excel file. The application platform cannot read Mac-formatted documents (i.e., Pages, Numbers, and Keynotes) so these should be submitted in a PDF format. **Applications will be considered incomplete if any part of any section is missing.**

The application will be collected in two stages, with the first focused on basic organizational details used to determine eligibility and summary information to determine ability to implement the grant program requirements. Based on the First Stage/Eligibility Screening review, applicants will be encouraged, discouraged, or deemed ineligible for submitting a more rigorous Second Stage Full Application.

The application includes Reusable Tasks in our online grant application platform. Reusable Tasks can be completed once and be reused without further edits across every application through this platform. Organizations can update Reusable Tasks as needed as an organization's information evolves over time and updated or new documents become available.

### **FIRST STAGE/ELIGIBILITY SCREENING APPLICATION TASKS**

#### **A. Applicant Information (Reusable) Task**

Organizations must provide the following information and documents using data entry fields or uploads. The document uploads will be used to assess legal eligibility for the Grant Program and data fields will be used to populate any resulting grant agreement. Applicants should fill out this information as if they were drafting a contract using specific and exact information.

- Legal Name of Applying Organization as registered with the Maryland State Department of Assessment and Taxation (SDAT)
- Organization's Maryland SDAT Department ID Number
- Organization's Federal Tax Identification Number
- Organization's Montgomery County Central Vendor Registration Service (CVRS) Identification
- Organization's mission statement
- Organization's website (Required for this Grant Program)
- Contact Information for the Organization's proposal point-of-contact (POC)
- Contact Information for the Organization's Legally Authorized Signatory
- Description of Organization's Grant and Financial Management Practices
- Description of Organization's Data Collection and Management Practices
- Upload of IRS Tax Exempt Determination Letter for Nonprofit Organizations
- Upload of Most recent IRS 990 Form for Nonprofit Organizations or an explanation of why your organization is exempt from filing 990s
- Upload of Current Federal Negotiated Indirect Cost Rate Agreement (NICRA) (Optional)

- Upload of Current board list with names, position on board, and contact information
- Upload of Public Copy of Most Recent Independent Audit Report (Optional)
- Upload of Most Recent Annual or other Organization Reports (Optional)

Good Standing (or equivalent status) with the Maryland State Department of Assessment and Taxation (SDAT) will be regularly checked by the Office of Grants Management and other County stakeholders. The County is required to check this status at the time of review, during finalization of grant agreements, and for payments during the life of a grant agreement. It is critical that applicants remain registered and in Good Standing with SDAT as applicants will be disqualified from a grant competition, delay or even lose a grant award, and/or face delays in grant payments if they are not in Good Standing.

Applicants can verify their status with SDAT via this link:  
<https://egov.maryland.gov/BusinessExpress/EntitySearch>

### **B. Applicant Background (Reusable) Task – Optional**

The Office of Grants Management collects data through this Task for post-award analysis to understand application and award trends as well as how to support the diverse communities in Montgomery County. In line with Montgomery County’s Racial Equity & Social Justice goals, the Office of Grants Management is collecting racial and ethnic information on the leadership of nonprofit organizations. The structure of this portion of the survey is based on federal standards for collecting racial data. Given the County’s significant diversity, this survey is also collecting ethnic data. Note that the information entered should be based on how the person identifies themselves.

- Organization estimated staffing size serving Montgomery County in a given year
- Organization estimated budget, including by funding source, for Montgomery County programs, services, and other initiatives in a given year
- Organizational leadership, including Executive Director and Board Members, race and ethnic information

Data collected through this optional Task will **not** be visible to Review Committees and will **not** be used in evaluation and scoring of applications.

### **C. First Stage/Eligibility Screening Task (data fields and optional uploads in PDF format)**

Organizations applying for this program are required to provide evidence of relevant licenses, as well as internal policies and procedures to implement the proposed project. Specifically, the applicant organization is required to provide the following:

- Description of Organization’s Federal Grant Awards in the last 5 years
- A copy of their own or their subcontractor(s)’ Maryland Home Improvement Commission license or an explanation for how that will be verified for subcontractors that will be hired during grant award implementation.

- Description their organization’s Procurement and Subcontracting policies and procedures. As an option, they may upload internal procurement and subcontracting policies and procedures (10-page limit per document, PDF format required).

Organizations must also provide the following information about an eligible affordable housing community that would receive Federally funded electrification upgrades. Specifically, the applicant organization is required to provide the following information for at least one community (maximum three communities):

- Affordable Housing Community Name
- Address
- Website (Optional)
- Number of units
- Types of fossil fuels used onsite
- Estimate of costs to electrify the community (if available)

**SUMMARY OF SECOND STAGE/FULL APPLICATION TASKS**

The following Tasks will be required of organizations choosing to submit a Full Application to the Second Stage of this grant program. Applicants are encouraged to only begin working on Second Stage/Full Application tasks after being notified of the First Stage/Eligibility Screening results.

**C. Licenses, Policies, and Procedures (no page limit, PDF format required)**

Organizations applying for this program are required to provide evidence of relevant licenses, as well as internal policies and procedures to implement the proposed project. Specifically, the applicant organization is required to upload a copy of their own or their subcontractor(s)’ Maryland Home Improvement Commission license or an explanation for how that will be verified for subcontractors that will be hired during grant award implementation. Applicants are required to describe their organization’s Procurement and Subcontracting policies and procedures. As an option, they may upload internal procurement and subcontracting policies and procedures that are compliant with Federal requirements (10-page limit per document, PDF format required).

**D. Scope of Work (5-page limit, PDF format required)**

The Scope of Work includes several data points related to the proposal:

- Project Title – Low-Income Housing Electrification and Indoor Air Quality Improvements Pilot Project in Montgomery County, Maryland
- Project Overview – Brief description of the project (100 words maximum)

The proposal’s Scope of Work Narrative should answer the following questions. If a question below does not apply to your proposal, please indicate that it is not applicable within the Scope of Work Narrative.

1. Please describe your organization's experience implementing Federally funded projects, specifically highlighting Federal grants in the last 5 years. Include multiple examples, noting whether your organization was the Lead Applicant or a Sub-Recipient on each project and ability to stay on scheduled and within budget.
2. Please explain how your organization will verify the income eligibility of low- and moderate-income residents in your communities.
3. What are your organization's current capabilities to implement the proposed project? Please note your capacity, including human and financial resources, to implement electrification in your proposed community location(s). Feel free to reference other Tasks in this application (i.e., Staffing Plan) for more detail instead of repeating it in this narrative.
4. Describe how this project will meet the Statement of Project Objectives (e.g., timeline, milestones) for Budget Periods 2 and 3 under this Federal grant award.
5. Please describe your organization's experience with planning, designing, and executing in-unit upgrades at your properties, including but not limited to: available subcontractors who have performed work at the eligible community previously, tenant disruption mitigation plans, and ability to complete upgrade work efficiently.
6. What accountability/quality assurance checks and mechanisms will you have in place to ensure that the target beneficiaries are provided with quality services and equipment? What process will you have in place to remediate any potential problems that may arise because of faulty installation or defective parts? How will repairs after installation be handled?
7. What is your organization's capability to implement this project in a culturally, linguistically, and/or technically proficient way for the target population/community?
8. Overall, how will the requested funding have a positive outcome on your organization and target population/community? Please reference direct and indirect benefits that this project will have on impacted residents, their utility bills, health impacts, the County's climate goals, and other benefits as appropriate.

**E. Project Budget Task (No page limit, MS Excel format required) and Budget Narrative/Justification (2-page limit, PDF format required)**

The Project Budget includes several data fields related to the proposal:

- Year 1 (Budget Period 2) Montgomery County Funding Request - Amount requested from the County for the initial 12 months
- Year 2 (Budget Period 3) Montgomery County Funding Request - Amount requested from the County for months 13-24
- Year 3 (Budget Period 3) Montgomery County Funding Request – Amount requested from the County for months 25-36
- Year 4 (Budget Period 3) Montgomery County Funding Request – Amount requested from the County for months 37-48
- Total Montgomery County Funding Request – Total amount requested from the County
- Total Project Cost – Total cost of project from all funding sources

The budget for this proposal must use the County-provided Excel template and contain detailed itemized cost information for all proposed expenses plus any indirect costs. Please

also include the value of any cost-shares such as donations, other grants received, and in-kind or pro bono services that you anticipate being donated and that are related to this proposal (please note that cost-share from the sub-grantee is not required for this grant). The Program Budget will be uploaded as an attachment to the application in MS Excel format.

- Applicants may propose a multi-year budget of four years in length with an estimated inflationary escalation factor for each year.
- Project Budgets may also include indirect costs. Indirect costs may include general administrative costs such as: legal, accounting, liability insurance, audits, and the like. **Indirect costs may only be charged on direct operating expenses, not capital expenses.** If applicants have a federal Negotiated Indirect Cost Rate Agreement (NICRA), then they must use that rate within their application. Applicants without a NICRA cannot exceed the 15% indirect rate in their budget.
- The Grant Program requires a standard budget template so applicants must use the required budget template.

### **Budget Narrative/Justification**

In addition to a Project Budget, the proposal must include a Budget Narrative/Justification that clearly describes the proposed expenditures, including the purpose or reason for the expenditure and an explanation of how costs are calculated. If an organization wishes to include quotes or backup for prices listed in the budget, it may upload these items as optional attachments (10-page limit per document, PDF format required).

In addition to including the purpose of an expenditure and an explanation of how costs were calculated, applicants should also address the following, if applicable:

- Cost share is not required, but if including cost share, please briefly outline the source.
- Please specify how your project would be affected if DOE modifies the scope or total funding awarded. State whether your project could be completed with a smaller amount, and how your projected outcomes would be affected by any funding reduction.
- If your organization does work regionally, please provide information to assure us that the Montgomery County funds will not simply enable you to shift current, non-County monies to operations outside the County but rather will allow you to add to or expand your work on behalf of services in Montgomery County.
- If your organization has other funding sources, please provide us with information to assure us that the Montgomery County funds will not simply enable you to supplant current, non-County monies but rather will allow you to add to or expand your work on behalf of services in Montgomery County.

### **F. Project Staffing Plan Task (2-page limit, PDF format required)**

This section should detail the staff assigned or to be hired for the program, staff positions, and percentage (%) of time spent on the program. If the position is not filled, a projected start date within the grant period as to when the position will be filled should be supplied. Note, some prior grantees have experienced trouble hiring staff at very low wages; your application will not be penalized for proposing that staff be paid commensurate with their specialized talents and experience in delivering the proposed services.

The Staffing Plan should detail at a minimum for the incumbent, position to be filled, and/or contractors to be supported by the project:

- The name of the position and/or subcontractor(s);
- Expected salary or hourly rate for the position and/or subcontractor(s);
- Percentage of staff time to be dedicated to the proposed project;
- Any current and relevant degrees, licenses, certifications, or other professional credentials related to the project;
- Outline of language skills and/or cultural competencies; and
- Description of the position role in relation to the proposed project.
- Description of existing Current and Pending Support of key personnel that will be supporting the project.

Applicants may upload as optional attachments (10-page limit per document, PDF format required) resumes of incumbents in the positions and/or position descriptions of these positions if they are not filled.

Note that if an employee is to be paid 100% through grant funds from this program, all their professional time, over and above routine administrative tasks, must be devoted to the proposed program's eligible work. Do not underestimate deliverables to allow program-funded staff to do work outside this grant. If you want the staff to be available to help efforts outside the grant, be sure to include only partial salary for that person in your staffing and budget proposals. Likewise, do not double-count staff time paid for by other Montgomery County, Federal, State, District of Columbia, or private foundation grants.

#### **G. Project Work Plan/Timeline Task (1-page limit per year, PDF format required)**

This section should outline the implementation schedule of the proposed program over the two Budget Periods in the grant agreement period of performance.

The implementation schedule over the performance period should list:

- The program's objectives and related activities;
- Timeline for implementation and completion per the Federal grant agreement; and
- Responsible staff and relevant licenses/certifications.

The performance period must align with the Federal grant agreement. The final performance period for an award will be contingent on when the actual grant agreement is signed by all parties.

Describe how you will meet the grant's committed milestones that pertain to the housing partner, which are as follows: completing existing conditions diagrams or drawings, completing design documents, completing environmental questionnaires for each site, completing NEPA documents for each site, obtaining permits for all sites, completing construction for all units, and contributing data, content, and photos for the final report and case study.

#### **H. Performance Plan and Performance History (2-page limit, PDF format required)**

The **Performance Plan** outlines how you will measure success for your proposed project. To that end, the Performance Plan should include the following:

- **Key Performance Indicators (KPIs)/metrics:** Outline of the metrics to be collected, targets for each metric, and the quantitative/qualitative data collection and evaluation methods for each metric. Both target outputs and outcomes should be addressed. The applicant should propose KPIs relevant to measuring the success of their proposed project. All grantees will be required to report the following metrics; as such, all applications should include planned targets for these indicators:
  - Number of households upgraded
  - Installations by system type
  - Status of all active permits (e.g., requested, closed)
  - Itemized equipment and labor costs (per unit, per system electrified)
  - Dates and percentage completion of milestones, tasks, and subtasks in the Statement of Project Objectives
- **Key Milestones/Benchmarks** List the specific milestone to be achieved per the Statement of Project Objectives and the impact achieving it will have on the organization in alignment with the Federal grant agreement.
- **Specific Compliance with Term 35. Reporting Subawards and Executive Compensation in the Special Terms and Conditions that apply to Subrecipients (if applicable)**

The **Performance History** should provide evidence of capacity to undertake the proposed project based on pertinent work experience with regard to the work discussed in the Scope of Work Narrative. The response must describe examples of the applicant's prior or current relevant experience with regard to its ability to successfully operate and manage projects focused on supporting LMI households with upgrade projects. The outcomes described may be the result of projects funded by previous County grants, other funding sources, initiatives outside of the County that your proposals seek to emulate in the County, or be based on research and/or other best practices. As part of its response, the applicant must describe specific examples of both successes and failures in managing similar types of work. The response must describe the particular details of the success or failure, explain how it is applicable/relevant to the proposed project, and explain how the applicant will incorporate any lessons learned into the management and implementation of the proposed project.

You may upload optional letters of reference or support, as well as any program-related materials or other supporting materials (10-page limit per document, PDF format required).



## **SECTION III – SCORING OF APPLICATIONS**

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### **Scoring Criteria**

Applicant’s proposal submissions will be evaluated using the following confidence ratings based on the below weighted criteria. Confidence ratings are another form of adjectival rating that allow evaluators to assign ratings more holistically. Confidence ratings provide evaluators the ability to look more holistically at both the strong points and weak points of a proposal to capture raters’ overall confidence in the applicant’s likelihood to succeed, helping smaller organizations who may be stronger overall than some more seasoned, larger organizations. Confidence ratings are identified by the federal government as an innovative practice that may help with reducing the lead time from solicitation to award.<sup>1</sup>

3 – Confident	The Reviewers are confident that the applicant understands the requirements, proposes a sound and relevant project, and will be successful in implementing the proposed project.
2 – Somewhat Confident	The Reviewers are somewhat confident that the applicant understands the requirements, proposes a sound and relevant project, and will be successful in implementing the proposed project.
1 – Not Confident	The Reviewers are not confident that the applicant understands the requirements, proposes a sound and relevant project, and will be successful in implementing the proposed project.

### **FIRST STAGE/ELIGIBILITY SCREENING APPLICATION CRITERIA**

#### **Criterion A: Organizational Capability (50 points)**

- Applicant provided all required documentation.
- Applicant is an eligible sub-recipient per the County’s Federal grant agreement.
- Applicant has prior Federal grant management experience.

#### **Criterion B: Proposed Community Eligibility (50 points)**

- Community identified is an eligible site for the deployment of grant funds per the County’s Federal grant agreement.
- Community is located within an Equity Emphasis Area (preferred but not required).

### **SECOND STAGE/FULL APPLICATION CRITERIA**

#### **Criterion A: Project Goals and Grant Program Priorities (20 points)**

- In line with the priorities for the Low- to Moderate-Income Housing Electrification program, the proposal:

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<sup>1</sup> See [Executive Office of the President, OMB Memo for Chief Acquisition Officers, Senior Procurement Executives on reducing procurement administrative lead time using modern business practices \(January 15, 2020\)](#)

- Proposes an eligible project that provides electrification upgrades for LMI residents;
- Applies a racial equity lens and demonstrates cultural proficiency and inclusivity of LGBTQIA+ community members;
- Ties into the County’s climate goals outlined in the Climate Action Plan.

**Criterion B: Sound Fiscal Management and Budget (20 points)**

- Applicant has robust grant and financial management systems that can handle Federal requirements;
- Expenses listed in the Budget and Budget Justification are consistent with the Project Strategy, Staffing Plan, and other parts of the proposal;
- Applicant’s Budget and Budget Justification reflect eligible, reasonable, and realistic costs needed to implement the proposal and achieve the stated outcomes in the Federal grant agreement;
- Applicant has prior experience managing a Federal grant award, including reporting requirements and compliance with relevant Code of Federal Regulations (CFR).

**Criterion C: Organizational Capability (30 points)**

- Applicant provides evidence of capability to undertake the proposed project and manage subcontractors;
- Applicant subcontractors and vendors are Montgomery County-based (preference, not a requirement);
- Applicant demonstrates effectiveness in terms of internal structure, technical capacity, personnel, procurement, and subcontractor management (as applicable) systems in meeting the outcomes of the project;
- Applicant demonstrates the cultural, linguistic, and/or technical proficiency to work with their target population/community in the context of the proposed project;
- Applicant demonstrates capacity to reach and verify the eligibility of LMI residents.

**Criterion D: Performance Plan and Performance History (15 points)**

- The Performance Plan is aligned with the Project Strategy Narrative, Budget, and Work Plan;
- Applicant proposed milestones/benchmarks and KPIs are relevant, clearly defined, measurable, time-specific, and aligned with the Statement of Project Objectives;
- Applicant demonstrates in their Performance Plan a clear process to measure/evaluate its project;
- Performance History demonstrates relevant experience and evidence that the proposed project will have the desired outcomes for the target population;
- The applicant incorporates relevant lessons learned from its experience into the proposed design and implementation of the project.

**Criterion E: Soundness of the Overall Proposal (15 points)**

- Proposal clearly demonstrates the effectiveness of proposed activities and, if funded, will result in the accomplishment of their stated outcomes;
- The implementation plan within the proposal is realistic and achievable based on the County’s Federal grant award.

## MISCELLANEOUS

- Those persons scoring the proposals on the Review Committee will confirm that they have no conflicts of interest.
- Neither the County Executive nor any elected official will be involved in the scoring of grants or determining winners and amounts of awards.
- Scores and award amounts are non-appealable.
- Reviewers' comments and the scores themselves are deliberative and privileged and will not be released. However, applicants may request a report from the Office of Grants Management summarizing the Review Committee's feedback.
- County officials may decline to debrief with unsuccessful applicants as to why their proposal was not granted, or why their funding request was not granted in full.
- Winners will be announced publicly, and successful grant applications and award letters may be subject to release (with redactions as allowed by law).

## **SECTION IV – CERTIFICATIONS, ACKNOWLEDGMENTS, AND ASSURANCES**

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The applicant shall complete and return the Certifications, Acknowledgments, and Assurances listed with the application submission provided in the Application Certification section of the application in SM Apply online grants application portal. The specific items in this section are listed below:

### **Montgomery County Ethics Questions**

Note that individuals employed by partner agencies such as Montgomery College, Montgomery County Public Schools, and WorkSource Montgomery do not count as Montgomery County Government employees for the purpose of this Grant Program. If you are unsure if a position applies, please contact the Office of Grants Management for clarification.

Does your organization employ current employees or contractors of the Montgomery County Government? This applies for employees that are paid by your organization but are also paid by Montgomery County Government.

Does your organization's Board of Directors include current employees or contractors of the Montgomery County Government? This applies to volunteer Board of Director positions.

If you answered yes to either question, please describe the employee(s) role and function as it applies to your nonprofit organization. Answering "yes" to either question does **not** exclude your organization from being eligible to apply. Instead, we would like to receive this information upfront so that we can allow adequate time for the Ethics Commission to review.

### **Acknowledgments Agreed to by All Applicants**

- ✓ Applicant acknowledges that this grant application may not be revised or altered after submission.
- ✓ Applicant acknowledges that if funding is awarded, the organization will enter into a grant agreement with the County.
- ✓ Applicant acknowledges that awards may not be distributed as a lump sum but may be reimbursed or provided on a fixed schedule after sufficient documentation is submitted to the administering County agency.
- ✓ Applicant acknowledges that any funds submitted for reimbursement must be spent **AFTER** the grant agreement is finalized and a Notice to Proceed is secured.
- ✓ Applicant has cited in this application all individuals affiliated with the organization and this program who are employed by Montgomery County.

### **Assurances Agreed to by All Applicants**

If the grant is awarded, the applicant assures that:

- ✓ The applicant will administer all awarded funds through this Grants Program.

- ✓ Funds received will be used solely for the documented activities within the submitted proposal.
- ✓ The applicant has read and will conform to the program guidelines and any other conditions imposed by the County in connection with the grant.
- ✓ The applicant organization intends to comply with the Title VII of the Civil Rights Act of 1964, indicating that no person will be excluded from participation or be denied the benefits of any program, activity, or service on the basis of race, sex, sexual preference, color, religion, ancestry, age, national origin, or handicap. The applicant further agrees to make every attempt to ensure that the program is accessible to persons with disabilities.
- ✓ Please note that applications are subject to the Maryland Public Information Act (MPIA) (found at Md. Code Ann., State Gov't., §10-611 through -628 (MPIA) and the County must comply with the disclosure requirements of the MPIA when a request for documents is received.
- ✓ The applicant understands that all grantees that receive awards under this Grant Program may be requested to show proof of insurance prior to receiving the funds., when requested, must be able to show proof of all insurance coverage required by law.
- ✓ The applicant agrees that any time before final payment and three (3) years thereafter, the County may have the grantee's expenditure statements and source documentation audited.
- ✓ If there are any changes that need to be made to the grant application after submittal or if the organization ceases operations or becomes a subsidiary of another organization, you have the responsibility of notifying the appropriate County administrator.
- ✓ The filing of this application is made by the undersigned individual, officially authorized to represent the applicant organization by its governing board.
- ✓ I hereby certify that information submitted in the grant application is a true and correct statement of facts. I, as a designated legal representative of the Organization, further certify that this Organization shall abide by and be subject to all applicable Federal, State, and Local laws and regulations pertaining to any subsequent grant that may be issued.