

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

**FY24 Healthy, Efficient, Electrified,
Climate-Adapted Pilot (HEECAP) Homes
Grants Program**

Program Summary: The Department of Environmental Protection (DEP) and the Office of Grants Management (OGM) are soliciting grant applications for the County's FY 2024 Healthy, Efficient, Electrified, Climate-Adapted Pilot (HEECAP) Homes Grants Program, which aims to retrofit income-eligible houses for energy efficiency, a healthy indoor environment, climate resilience and all-electric appliances. A total of \$1,500,000 will be made available to fund awards to eligible nonprofits between \$300,000 and \$1,500,000 for 12, 18, or 24 months. 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 how to complete the application.

Key Program Dates:

- **Program Opens for Applications:** Monday, February 26, 2024
- **MS Teams Live Online Grant Program Information Session:** Monday, March 4, 2024 at 1 PM
- **Submission Deadline:** Monday, April 8, 2024 at 11:59 PM

Key Program Resources:

- **Online Grants Application Platform:** <https://mcmdgrants.smapply.org/>
- **Program Page:** <https://mcmdgrants.smapply.org/prog/HEECAP>
- **[Click here](#) to join the Information Session OR for an event 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

A. Background

The Department of Environmental Protection (DEP) and the Office of Grants Management are soliciting grant applications for the County’s FY 2024 Healthy, Efficient, Electrified, Climate-Adapted Pilot (HEECAP) Homes Grants Program, which aims to retrofit income-eligible houses for energy efficiency, a healthy indoor environment, climate resilience and all-electric appliances.

This 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 HEECAP Homes Grants Program, the County seeks to pilot new ideas on the best strategies to help Low-to-Moderate Income (LMI) residents ensure their homes are resilient to climate change, safe, healthy, and efficient—in a broader effort to preserve and protect housing for vulnerable residents. This grant program seeks to fund projects and initiatives that meet that intent, specifically:

- Retrofit projects that remove fossil-fuel systems from homes and replace them with efficient electric systems, add batteries to onsite renewable energy systems, or perform other climate-resiliency measures not already funded through existing programs.
- Home improvement projects that are not currently funded by existing income-eligible weatherization and/or energy efficiency programs that improve the safety and health of residents.
- Leveraging County grant funding from this program to fix home problems that prevent LMI residents’ increased participation in existing weatherization and/or energy efficiency programs.

B. Target Population

The target population for this grants program is LMI residents (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 eligibility will be verified.

C. Funding Priorities

This program seeks to fill gaps not covered by existing federal, state and County programs, as well as to pilot approaches that may be scaled up into more established, large-scale County programs in the future, with the goals of maximizing emission reduction and adapting to climate change. Nonprofits that are already working with LMI residents to improve household energy efficiency are best positioned to be awarded funding under this program.

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

D. Eligible Expenses and Illustrative Activities

Eligible expenses under this grants program include both capital and operating costs. Capital expenses are one-time costs \$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.

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/home upgrades outside of Montgomery County, MD
- These grants are generally not intended to fund consumable items. Care should be taken to install 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 grants program 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 (e.g., unsafe foundation, collapsed floor/roof).
- Replacement of entire plumbing, electrical, or HVAC systems (including ducts).
- Replacement of windows or doors where existing units are not broken, missing, damaged beyond repair, or leaking and causing structural damage.
- Repairs covered by homeowner's or flood insurance.
- Repairs needed due to willful damage or negligence on the part of the owner/occupant.
- Cosmetic improvements (e.g., interior or exterior painting).
- Repairs to detached garages, barns, sheds, or storage buildings.

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

Training/Capacity Building:

Description	Cost per Participant*	Number of Participants
<i>Electrification/HVAC</i>		
Use of Manual J software approved by the Air Conditioning Contractors of America to develop HVAC load calculations	Up to \$500	3 employees/subcontractors
Electrification-specific energy auditor training using the Building Performance Institute curriculum	Up to \$750	3 employees/subcontractors
<i>Remediation</i>		
IICRC Mold Remediation Specialist certification for mold remediation and restoration services	Up to \$450	3 employees/subcontractors

*Advance Montgomery County Government approval will be required for costs that exceed those listed here

Procurement and Installation:

Type	Description and Requirements
Electrification of heating/cooling systems and domestic water heating	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.
Asbestos testing and removal	Testing and removal of Suspected Asbestos Containing Materials (SACM) if testing confirms that it contains asbestos. Includes vermiculite insulation and pipe wrap. Flooring is to be encapsulated where feasible. <i>Removal of flooring that contains asbestos will require County approval.</i>
Window repair, replacement or installation	This includes any required lead testing. <i>County approval will be required for window replacements funded by this grant.</i>
Roof repair/replacement	When there is documented need.
Electrical panel upgrades	Electrical panel “heavy up” to enable electrification of space heating, water heating, cooking, EV charging, installation of solar panels, and battery storage.
Electrical modernization	Replacement of knob and tube electrical wiring or branch circuit aluminum wiring to enable weatherization and electrification.
Solar battery storage systems	For resilience/standby power, complementing existing on-site PV solar
Chimney repair/removal	As needed for health and safety.
Interior repairs	Interior finish repair or replacement (walls, ceilings, floor coverings) up to 50% of total wall area to remediate water or mold damage. 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.

Dehumidifiers	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).
Radon mitigation systems	If measured radon levels are at or above the EPA's 4.0 pico-Curies per liter (pCi/L) action level measured with a short- or long-term test.
Flood insurance	Procurement of multi-year flood insurance coverage on residents' behalf that aligns with the grant period of performance

- The grantee will be required to verify that any work undertaken and paid for through this program is not covered by homeowners' 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.
- Any 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 e.g., Manual J.

E. Eligible Organizations

Applicants must meet all the following conditions:

- The organization must have a federal 501(c)(3) or 501(c)(4) tax-exempt status or be a collaboration between two or more entities with at least one having this 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, MD
- 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. County funding cannot be used to supplant other funding for already planned activities;

- Applicants may only submit one application per organization under this NOFO.

F. Award Information

Montgomery County Government anticipates awarding \$1,500,000 through approximately one to five grant awards. It is anticipated that each grant award may range between \$100,000 and \$1,500,000. The final amount will be dependent upon grant activities and final negotiation and may be lower or higher than the range. The duration of any grant award under this solicitation is expected to be 12, 18 or 24 months contingent on satisfactory performance and funds availability. The estimated start of grants awarded under this solicitation will vary based on when decisions are reached by the review committee. The resulting awards are anticipated to be tranche-funded based on successful completion of milestones and submission of reports as outlined below. This Grant Program does not commit Montgomery County to make any awards.

Reporting Requirements: After an initial kick-off/compliance orientation meeting, for which the grantee will receive an initial percentage of the total award, the grantee will be paid based on submission and approval of quarterly programmatic and financial reports to the County. 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. The County also reserves the right to conduct site visits to sites where grant funds are deployed (with resident approval) with the grant funds.

G. Application Review & Awards

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 with prior experience with applicants, updates to

priorities, or other factors.

H. Award Notification

Award notification letters are expected to be released approximately one month after the application deadline via email. 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.

I. Submission Guidelines

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 a SM Apply account, select the FY24 HEECAP Homes Grants Program, 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.

Applications are due no later than Monday, April 8, 2024 at 11:59 PM. All applications will be recorded upon receipt. Applications received after the deadline will be disqualified and will not be forwarded to the Review Panel for funding considerations. 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.

J. Information Session

An Information Session will be held on **March 4, 2024 at 1 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 or on the grants program application page.

K. 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

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 Task, 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 has difficulty reading Mac formatted documents (i.e., Pages, Numbers, and Key Note) so these should be submitted as PDFs or converted to MS Office formats.

Applications will be considered incomplete if any part of any section is missing.

The application includes Reusable Tasks in our online grants 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.

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 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 (Optional)
- 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 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, 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

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

Responding to these questions is optional and will have no impact on application reviews.

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

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. They may provide manuals or other documentation of these as an attachment under the Optional Supporting Documentation task.

D. Project Strategy Task (5 page limit, PDF format preferred)

The Project Strategy includes several data related to the proposal:

- Project Title – If awarded, Project Title will become the grant agreement name
- Project Overview – Brief description of the project (100 words maximum)

The proposal's Strategy 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 Strategy Narrative.

1. Please describe the specific population/community that your organization targets and explain your relationship to this population/community. How is your organization uniquely suited to have a positive impact on this population/community?
2. Please present a plan for how your organization will verify income eligibility of target beneficiaries.
3. In Montgomery County, our changing climate is impacting LMI residents' ability to live safely in their homes, and existing assistance programs do not always provide funding to address climate impacts, health hazards, replacing inefficient or unsafe fossil fuels appliances with efficient electric equipment, and other barriers to participating in these programs. How will your proposed solution address these issues or needs? Please explain in as much detail as necessary.
4. What are your organization's current capabilities to implement the proposed project? Please note your capacity, including human and financial resources, to implement projects. Feel free to reference other Tasks in this application (i.e., Staffing Plan) for more detail instead of repeating it in this narrative.
5. What accountability/quality assurance checks and mechanisms will you have in place to ensure that the target beneficiaries are provided with quality services? 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?
6. What is your organization's capability to implement this project in a culturally, linguistically, and/or technically proficient way for the target population/community?
7. 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 will have on impacted residents, their utility bills, health impacts, the County's climate goals, and other benefits as appropriate.

8. How do you envision that your proposed pilot project will inform the County's efforts to develop a more robust permanent program in the future? Please be specific.
9. If a collaboration is being proposed, what work have your organizations previously done together? What skills, experience, capabilities, and/or connections does each organization bring to the partnership? How will the roles and responsibilities under the project be separated by organization?

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

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

- Year 1 Montgomery County Funding Request - Amount requested from the County for the initial 12 months
- Year 1.5 Montgomery County Funding Request - Amount requested from the County for months 13-18 (as applicable)
- Year 2 Montgomery County Funding Request - Amount requested from the County for months 19-24 (as applicable)
- Total Montgomery Funding Request – Total amount requested from the County
- Total Project Cost – Total cost of project from all funding sources

The budget for this proposal should 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 is not required for this grant). The Program Budget will be uploaded as an attachment to the application, preferably in MS Excel format.

- Applicants may propose a multi-year budget of up to two 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 may use a rate of up to 15%.
- The Grant Program does not require a standard budget template so applicants should use whatever format meets the basic requirements, provides sufficient detail, and provides the best overview of expected costs under the proposal. Applicants may use this [optional budget template](#).

- If applying as a collaboration, please include the appropriate division of budget between the two or more organizations that are applying.

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 calculation of costs. If an organization wishes to include quotes or back up for prices listed in the budget, they may upload these items in the Other Supporting Materials section of the application.

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 total funding awarded were less than the amount requested. 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 or has other funding sources, please provide us with information to reassure 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.

F. Project Staffing Plan Task (2 page limit, PDF format preferred)

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. If applying as a collaboration, please note the organizational affiliation of each staff member. 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;
- Expected salary or hourly rate for the position;
- 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.

Applicants may upload as Other Program Materials in the Supporting Documents to be Upload Task resumes of incumbents in the positions and/or position descriptions of these positions if they are not filled.

Note, 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 preferred)

This section should outline the implementation schedule of the proposed program over the 12, 18 or 24 month 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 (on a 12-, 18- or 24-month time horizon as selected by the grantee); and
- Responsible staff and relevant licenses/certifications.

The performance period may assume specific start and completion dates or cover a generic period of time. The final performance period for an award will be contingent on when the actual grant agreement is signed by all parties.

H. Performance Plan and Performance History (2 page limit, PDF format preferred)

The **Performance Plan** outlines how you will measure success for your proposed project. To measure the success of the project, 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 that receive one or more upgrades.
 - Installations by type
 - Installations by ZIP code

- Number of households that have enrolled in weatherization/energy efficiency programs following grant-eligible upgrades (e.g., removed from program deferred lists)
- **Key Milestones/Benchmarks** List the specific milestone to be achieved, a target date to achieve it, and the impact achieving it will have on the organization.

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 Strategy 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 maximizing emission reduction and adapting to climate change. 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 type 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.

I. Optional Supporting Documents to be Uploaded Task (10 page limit per document, PDF format preferred)

- Letters of Refence or Support (optional)
- Collaborative partner materials, if applicable (optional)
- Program Related Materials (optional)
- Internal procurement and subcontracting policies and procedures
- Other Supporting Materials (optional)

SECTION III – SCORING OF APPLICATIONS

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 the strongpoints 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.¹

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.

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

- In line with the priorities for the FY24 HEECAP Homes Grants Program, the proposal:
 - Proposes a project that targets LMI residents;
 - Fills gaps not covered by existing federal, state and County programs;
 - Proposes a pilot approach that may be scaled up into more established, large-scale County programs with the aim of maximizing emission reduction and adapting to climate change.

¹ 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 \(January 15, 2020\)](#)

- Applies a racial equity lens, demonstrates cultural proficiency, and inclusivity of the 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
- 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

Criterion C: Organizational Capability (30 points)

- Applicant provides evidence of capability to undertake the proposed project and manage subcontractors (as applicable)
- 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
- The proposed milestones/benchmarks and KPIs are relevant, clearly defined, measurable, and time specific
- 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 proposed timeline

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.
- Scorers' comments and the scores themselves are deliberative and privileged and will not be released. However, applicants may request a feedback report from the Office of Grants Management summarizing the Review Committee's feedback. Winners will be announced publicly, and successful grant applications and award letters may be subject to release (with redactions as allowed by law).
- County officials may decline to debrief with unsuccessful applicants why their proposal was not granted, or their funding request was not granted in full.

SECTION IV – CERTIFICATIONS, ACKNOWLEDGMENTS, AND ASSURANCES

The applicant shall complete and return the Certifications, Acknowledgements, 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.

Acknowledgements 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.