



**Credit Union System Partner
Outreach, Engagement and Education
Frequently Asked Questions (FAQs)**

- 1. Question:** What is a Request for an Expression of Interest (RFEI) and how does it differ from a Request for Proposals?

Answer: Inclusiv is seeking credit union system partners to help us engage credit unions with whom they work closely. In order to reach a geographically diverse group of credit unions we anticipate developing formal partnerships with multiple system partners with different credit union membership so that we can ensure the word has been delivered across the whole system. For that reason, we released this as a Request for Expressions of Interest rather than a competitive Request for Proposals (RFP) process. This means that if you have ideas of how you would like to reach and engage your members, we want to hear them. Your responses can be tailored for what works within your geographies and your membership and will not be measured against what others are delivering. We will also be able to review all the responses and come back to each of you with a plan for how to work together (and with consistent pricing and transparency).

- 2. Question:** We want to support Inclusiv's efforts, but we have limited resources to commit at this time. Should we still proceed with completing the proposal?

Answer: Yes, we encourage you to complete the proposal. Inclusiv values collaboration and is open to tailoring partnerships to accommodate varying levels of resources. The proposal process helps us better understand your organization's capabilities and explore how we can work together effectively. You can identify where additional resources could help you better share this opportunity with your membership.

- 3. Question:** How is the "agreement period" defined in this proposal? Is it fixed as January 2025 to December 2027, or can we define the agreement period in our partnership proposal?

Answer: The agreement period is flexible and can be defined in your partnership proposal to align with your organization's timeline and scope of work. However, we have noted an agreement period of January 2025 to December 2027 in the Requests for Expression of Interest as a means of identifying the outside parameters of when the activities would ideally take place. Please specify your preferred timeline if it differs from this range.

- 4. Question:** We are a green bank and not a credit union. Are there opportunities for the National Clean Energy Fund (NCEF) to be involved?

Answer: We welcome participation from other mission-driven financial institutions and organizations that align with our goals. We encourage you to outline your organization's unique contributions and how they can support green lending initiatives in your proposal. However,

the Inclusiv CCIA program is unique to credit unions so the activities identified would need to be targeted to credit unions.

5. **Question:** Can a subcontractor under this award receive a \$50,000 contract for outreach work and additional contracts for compliance and market development work? Will these be considered as if they are separate and distinct contracts?

Answer: Yes. Subcontractors can receive separate contracts for distinct areas of work, provided each contract aligns with the objectives and should be clearly outlined and justified in the proposal. In fact, we separated the Compliance and Market Building work from this Outreach and Education Request because we anticipate entering distinct contracts to deliver services to support that part of the work. However, those contracts will be limited in number and will therefore be reviewed based upon the capacity of the partner to deliver services nationally and at scale.

6. **Question:** Can a Foundation and their Credit Union Association each be able to submit a response?

Answer: This outreach is directed at the league level and targeted to the members that are so well served by leagues with their foundations. We will accept proposals from either the League or its Foundation but will limit the contracts to only one of those two entities. We imagine that the Foundations and other League businesses will be well suited also for upcoming opportunities in other areas, including the Compliance and Market Building Request for Proposals (RFP), which will be announced soon. We anticipate releasing an RFP for a Compliance partner(s) in mid-December and an RFP for Market Building support in Q2 2025.

7. **Question:** Do you require the contracting partner to be a 501(c)(3) organization?

Answer: No, we do not strictly require proposals to come exclusively from 501(c)(3) organizations. Our primary focus is on ensuring that proposals are submitted by organizations or associations, rather than individual consultants.