



## Request for Consultant Qualifications and Quotes

### Consultant for Chief Operations Officer and Chief Compliance Officer Functions

SustainEnergyFinance (SEF, [sustainenergyfinance.org](http://sustainenergyfinance.org)), is a 501c3 based in Salt Lake City, Utah, with a focus on providing financing for clean energy, energy efficiency, and climate resilience in the affordable housing and commercial sectors. SEF is seeking a part-time (approximately 20 hours per week) consultant to serve in a dual capacity as Chief Operations Officer and Chief Compliance Officer. This consultant will support operational infrastructure development, manage internal systems, and ensure compliance with relevant state, federal, and philanthropic requirements. The position may expand to full-time (approximately 40 hours per week) as operations scale. The position is currently envisioned to be a consultant role with the potential for exempt employee opportunities as appropriate.

### Scope of Work

The contractor shall support the establishment and operational development of SEF and the development and deployment of its lending programs, products, and services. Services will include, but are not limited to:

- Designing and implementing SEF's core operational systems, including financial reporting, compliance, risk management, and internal controls, in coordination with the CEO and Board and in accordance with federal requirements and guidance;
- Serving as the designated Chief Compliance Officer, responsible for ensuring institutional compliance with regulatory and contractual obligations;
- Developing and refining organizational policies, procedures, and governance protocols in coordination with the CEO and Board, aligned with federal guidelines and best practices;
- Supporting annual budgeting and multi-year financial forecasting in partnership with the CEO;
- Preparing internal and external materials, including reports for the Board of Directors and stakeholder briefings;

Over time, additional requirements may include the following:

- Assisting with regulatory filings, reporting obligations, and ongoing legal compliance in coordination with the CEO;
- Advising on organizational structure and staffing strategy to support growth and scale;
- Contributing to the design and implementation of SEF's financial products and services;
- Preparing and supporting fundraising applications for SEF's business operations and strategic initiatives;
- Supporting the development and management of strategic partnerships with government agencies, philanthropic funders, and community organizations in coordination with the CEO;

- Developing and advising on strategic planning, including the establishment and monitoring of Key Performance Indicators (KPIs) tied to mission impact and operational efficiency;
- Supporting the development and implementation of human resources tools, processes, and functions;
- Supporting the development and deployment of SEF's lending programs, products, and services, including design, implementation (including project sourcing and deal generation), compliance, and integration with operational infrastructure.

#### *Deliverables*

Anticipated deliverables include, but are not limited to, the following:

- A comprehensive business plan and quarterly Objectives and Key Results (OKRs) linked to strategic KPIs;
- A full suite of organizational policies, procedures, and operational manuals;
- Internal communications and Board-facing materials, as needed;
- Fundraising applications and supporting documentation, as needed.

#### **Qualifications and Scoring Matrix**

Applicants must be based in Utah with flexible availability (20 hours per week on average, with potential to scale to 40 hours per week) and able to work in person or remotely. Applicants may be subject to e-verify and may need to pass vendor screening processes for federal work. Applications are welcomed from US Citizens and Green Card holders only.

Applicants should meet the qualifications described in the table below and their applications will be scored against the corresponding matrix.

<b>Criteria</b>	<b>Max Points</b>
Proven and relevant 5 or more years experience in nonprofit, public sector, or mission-driven operations.	25
Strong familiarity with compliance in federal grants, clean energy, and/or climate finance.	25
Commitment to the organization's mission, values, and community-based impacts.	20
Deep expertise in energy or project finance.	15
Overall fit with the organization.	15



## **Submission Requirements**

Please email the following materials to [connect@sustainenergyfinance.org](mailto:connect@sustainenergyfinance.org) by May 9, 2025:

1. Resume or CV that demonstrates the applicant's prior experience delivering the scope of work above
2. Brief paragraph (no more than 250 words) describing interest and alignment
3. Estimated hourly rate (assuming 2,080 hours in a work year)

## **Timeline**

RFQ released: April 28, 2025

Submissions due: May 9, 2025

Applications scored: May 16, 2025

Consultant engaged: May 19, 2025

## **Selection Process**

Applications will be reviewed and scored against the qualifications above by SustainEnergyFinance staff and board. Selection will be based on the highest application score.