



Terms of Reference: Saint Lucia Electric Mobility Consultant

Position: Project Specialist
Contract Type: Independent Consultant
Funding Source: Global Environment Facility
Country of Focus: Saint Lucia
Contract Length: Not to exceed 30 work days
Expected timeframe: September- October 2018

Background: Rocky Mountain Institute (RMI) is an independent nonprofit founded in 1982—transforming global energy use to create a clean, prosperous, and secure low-carbon future. It engages businesses, communities, institutions, and entrepreneurs to accelerate the adoption of market-based solutions that cost-effectively shift from fossil fuels to efficiency and renewables. In 2014, RMI merged with Carbon War Room (CWR), whose business-led market interventions advance a low-carbon economy.

With an independent, objective, and fact-based approach, the Islands Energy Program brings experience gained from engagements with island governments and utilities to solve the toughest energy challenges. In 2015, the RMI Smart Island Economies program joined with the Clinton Climate Initiative Diesel Replacement program to form the Islands Energy Program. The Program is currently working with select island partners to support a cost-effective energy transition to benefit all national stakeholders.

The Islands Energy Program's strategy focuses on three complementary and mutually reinforcing components, which implemented in an integrated and strategic manner facilitate successful energy transitions in island countries: long-term energy transition planning, near-term renewable energy and energy efficiency project implementation, and regional capacity building. Following growing interest in electric vehicles (EVs) in the Caribbean, the program will apply its expertise to the mobility space beginning with a first project focused on understanding the opportunity to procure EVs for government fleets.

This initial project will be to assist the Government of Saint Lucia in: 1. facilitating the development of the government's vehicle fleet goals and objectives, 2. developing a vehicle eligibility criterion to be used to assess which fleet vehicle use cases can be transitioned to EVs on a vehicle-by-vehicle basis, and 3. conducting a fleet assessment to recommend which vehicles should be converted to EV technologies.

Scope of Work: The Independent consultant will be responsible for supporting the Island Energy Program work in this initial mobility project with the Government of Saint Lucia.

Specifically, this project will:

1. *Develop goals and objectives:* At this stage the RMI team plans to engage with key Government of Saint Lucia decision makers needed to procure EVs for the government fleet. This process will serve to provide baseline information to all stakeholders, alignment and consensus on an analysis process, and alignment on the government's goals and objectives for their vehicle fleet.
2. *Develop eligibility criteria:* At this stage we will align with our partners on the metrics, determine what type of vehicles should be converted to EV technology, and provide a list of vehicle types that have that have EV options available now and in the near (announced by manufacturers) future.
3. *Undertake fleet assessment:* Given all the available data as well as the goals and objectives of the group, present the near-term actions for converting vehicles to EVs, propose a timeline for these actions, and present the budget requirements for this conversion.



Responsibilities: The consultant will work collaboratively with the RMI Islands Energy Program team to ensure the successful execution of the outlined scope of work. Upon the successful execution of this project, the consultant will have completed three key deliverables including: 1. A slide deck to be presented to on island stakeholders, 2. A short memo summarizing the process for determining vehicle eligibility criteria, and 3. A final report that summarizes process, analysis, and key recommendations of this project.

Below are further details of the tasks and key deliverables the consultant will be responsible for:

Task 1: Review the data already collected by the RMI team and request remaining needed data from our island partners

Task 2: Utilize data already in RMI's possession to prepare in a slide deck a high-level summary of: Saint Lucia's current transportation system and the physical and operational attributed of Government of Saint Lucia's current government fleet

Task 3: Conduct basic market analysis of EVs to present in a slide deck

Task 4: Work with Island Energy Program team to develop an outline of a proposed analysis methodology for this study and present proposal in slide deck

Deliverable 1: The consultant will take the lead, with support from Island Energy Program staff, in putting together a **slide deck** to be presented and discussed during an in-person facilitated conversation. This slide deck will have three main sections: a. Summary of current state, b. Process description, and c. Goals and objectives.

- a. The summary of current state section will describe the global view of EV technology and market, the current mobility situation of Saint Lucia, and describe both the physical and operational attributes of Saint Lucia's current government fleet.
- b. The process description will outline to partners a high-level description of our proposed analysis process, will ask for validation of the key assumptions, and will request specific data.
- c. Goals and objectives slides will help guide a facilitated conversation to help to help surface the stakeholder's top goals and objectives for their vehicle fleet. These goals and objectives will later be used to help develop metrics to be used in developing EV eligibility criteria.

Deliverable 1 is expected to take 7 days

Task 5: Travel to Saint Lucia with at least one member of the Islands Energy Program to prepare for an on-island meeting with key decisionmakers to help surface goals and objectives

Task 6: While in Saint Lucia, facilitate a discussion amongst key decisionmakers and present prepared slide deck

Task 7: While in Saint Lucia, interview government fleet managers and collect any remaining data

Trip is expected to be 4 days (1.5 days for travel and 2.5 days on-island)

Task 8: Work with Island Energy Program team to update proposed methodology for the analysis based on stakeholder input



Task 9: Work with Island Energy Program team to propose metrics to be used as inputs for a model based on the goals and objectives outlined by the key stakeholders

Deliverable 2: The consultant will take the lead in writing a 2-3 page **memo** that describes proposed metrics and describe how proposed metrics will be used as inputs for our model to be presented to the key stakeholders for feedback. This memo will also present our initial understanding of what type of vehicles should be converted to EV technology and will provide a list of vehicle types that have that have EV options available now and in the near (announced by manufacturers) future.

Deliverable 2 is expected to take 3 days

Task 10: Along with the Island Energy Program, host stakeholder call to gather feedback from key stakeholders on proposed methodology and metrics

Task 11: Iterate on analysis methodology based on stakeholder input

Task 12: Build model that follows agreed upon methodology and incorporates an economic and feasibility analysis

Task 13: Based on model output, prioritize vehicles recommended for electrification

Deliverable 3: The consultant will take lead in writing a report that summarizes the a. the project process, b. results, and c. key recommendations.

- a. Project process: Summarize the process undertaken including key goals, objectives, and metrics used
- b. Results summary:
 - Describe how recommended vehicles were selected (borrowing from Deliverable 2)
 - Describe recommended vehicles to swap in the short term given existing technology (up to 2020-2022) and give suggestions given expectations of where the market is going
 - Describe the impact associated with proposed vehicle swap given metrics set out by the group's goals and objectives
- c. Key recommendation:
 - Given our understanding of budget and timeline constraints, propose path forwards for procuring EV
 - Briefly discuss basic necessary infrastructure investments (i.e. number of charging ports, cost considerations, and electricity demand)
 - Briefly outline basic operational best practices
 - Briefly suggest potential other grid benefits

Deliverable 3 is expected to take 16 days

Timeline of Activities:

Activity	Number of Work Days	Suggested Timeframe
Deliverable 1	7 days	Expected by mid to late September
Trip	4 days	Expected late September
Deliverable 2	3 days	Expected by mid-October
Deliverable 3	16 days	Expected by the end of October

Reporting: The consultant is expected to work collaboratively with the Islands Energy Program and check-in regularly with to the project manager: Ana Sophia Mifsud (amifsud@rmi.org).



Travel: The assignment will require a trip to Saint Lucia for up to 4 days to prepare for a presentation, collect data, host a facilitated conversation on goals and objectives, and present a prepared slide deck. Eligible travel expenses will be paid in full by RMI, upon submission of invoices to Ana Sophia Mifsud & RMI's Finance Department. Expenses must be compliant with RMI's Travel Policy.

Payment Schedule: The selected consultant will be paid via a lump sum contract for time and non-travel related expenses. Travel expenses for on-island travel will be reimbursed separately according to RMI's travel policy.

Breakdown of Payment Schedule:

- 10% upon signing of the contract
- 30% upon the successful delivery and approval of deliverables 1 and 2
- 60% upon the successful delivery and approval of deliverable 3

Qualifications:

Minimum Qualifications:

- Bachelors level degree or equivalent in sustainable management, environment, economics, geography or energy related discipline
- At least 5 years of direct relevant experience
- Fluency in English
- Experience in EV project development

Preferred Qualifications:

- Experience working in the Caribbean region
- Extensive experience working individually and in teams on development projects in the field, preferably developing countries
- Experience working with senior national and international policymakers
- Experience in working with large and operationally oriented organizations
- Demonstrated capability to present to audiences in a variety of cultural and institutional settings

Application Submission: To be considered, applicants must send their cover letter, resume/CV, and proposed flat rate to Ana Sophia Mifsud (amifsud@rmi.org) by 5pm EST Thursday August 30th.