**REQUEST FOR PROPOSALS:**

FACILITATION SERVICES FOR

PUERTO RICO CRITICAL FACILITIES MICROGRID WORKSHOP

**PROJECT CONTACTS:**

Roy Torbert

Principal, Islands Energy Program

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**PROJECT OVERVIEW**

The Islands Energy Team at Rocky Mountain Institute seeks a facilitation and process design firm (hereafter “Contractor”) to support agenda design and facilitation of a 2-day workshop in Puerto Rico, for the purpose of advancing critical facility microgrid deployment in Puerto Rico. The workshop will take place the week of September 23rd or 30th in San Juan, Puerto Rico.

The workshop will bring together 20-40 participants across a number of industries and communities to explore challenges and opportunities associated with renewable-energy and battery energy storage deployment at facilities across Puerto Rico. **While the workshop will be conducted in Spanish, planning and project management will be conducted in English. The respondent must be bilingual.**

The contract will be contingent upon delivery of materials and execution of the workshop in the project scope. The contract will only apply to this workshop.

**BACKGROUND**

Rocky Mountain Institute is an independent, nonpartisan nonprofit cofounded in 1982 by Amory Lovins, RMI’s chairman emeritus and chief scientist. RMI now has approximately 180 full-time staff, annual operations of $42 million, and a global reach and reputation. In 2014, Carbon War Room merged with and now operates as part of RMI. RMI 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. We employ rigorous research, analysis, and whole-systems expertise to develop breakthrough insights. We then convene and collaborate with diverse partners—business, government, academic, nonprofit, philanthropic, and military—to accelerate and scale solutions.

With an independent, objective, and fact-based approach, the Islands Energy Program brings experience gained from engagements with island governments, utilities, and civil society to solve the toughest energy challenges. The program is working with island partners to develop clean energy pathways to meet national goals and development objectives. Island nations possess abundant local and natural resources, such as the wind, sun, and in some cases geothermal potential, which can be harnessed to provide low-cost, clean, affordable, local energy. High electricity costs, volatile global oil prices, and a reliance on imported diesel create a clear business case for clean energy. By using local resources, entire countries can be powered by clean energy.

RMI’s Islands Energy Program has received philanthropic support to conduct a major research initiative with Puerto Rican partners on the economic and technical potential for critical facilities microgrids – the utilization of distributed energy resources (DERs) on-site with customers such as hospitals and community centers, for the purpose of providing energy resilience for these facilities and scaling the market for renewable energy solutions.

The Workshop will immerse participants in a collaborative environment coupled with RMI and partner subject-matter expertise to drive transformative change in the energy sector in Puerto Rico. The preliminary goals of the event are to:

1. Design and facilitate a 2-day meeting that provides and open and collaborative space for participants to identify opportunities and barriers facing resilient, renewable microgrids for critical facilities across Puerto Rico
2. Identify potential solutions, resourcing needs, and pathways forward to pilot and scale microgrid solutions for critical facilities in Puerto Rico, taking into account multiple perspectives including those of vendors, communities, government, finance, and utility and social net benefits
3. Commit to specific next steps, actions, or analysis to advance this cause

In addition to provide subject-matter expertise, Rocky Mountain Institute staff are experienced facilitators, and will be available to support the Contractor in design and execution of the workshop.

**AUDIENCE**

Participants in the workshop are decision-makers and community members from the public and private sectors in Puerto Rico, including government, renewable energy developers, community groups, financiers, and prospective customers.

**CHALLENGES**

The workshop is designed for participants to transcend their day-to-day work and to identify new solutions which are applicable and scalable within the industry broadly. In typical venues, participants are rarely immersed in such highly synthetic, multi-stakeholder conversations. This is a workshop where deeply held passions for the industry are reignited and participants leave feeling energized, hopeful, and part of a larger community. Building trust, establishing a spirit of innovation, curating collaboration, and coordinating a sense of community and purpose are critical for the success of this event.

**OPPORTUNITY**

RMI prides itself on providing collaborative spaces where people come together to identify new, unprecedented solutions. Unlike the majority of industry forums, RMI imparts an apolitical, creative, and participative problem-solving process. Participants are invited to “roll up their sleeves” and work together solving common challenges. The workshop event in particular seeks to identify actionable solutions that participants can carry forward in their own work. The event is not just about technical know-how; it is about building the capacity of all participants to be innovators and change-agents in their respective communities. The economic and political landscape in Puerto Rico are both damaged and renewed following Hurricanes Irma and Maria in 2017. This workshop builds off of RMI’s current projects across the Island following the disaster.

**PROJECT SCOPE**

The Contractor will provide a set of deliverables developed with bi-weekly feedback from Rocky Mountain Institute. The Contractor will report to Roy Torbert for these deliverables. Proposals are encouraged to identify specific process approaches to meeting the objectives as described. Deliverables may include, but are not limited to:

1. Bi-weekly one-hour calls with RMI
2. Two 2-hour design meetings, to be held via videoconference with the Contractor and RMI staff
3. Design and preparation of facilitation agenda for the workshop
4. Execution of the workshop as lead facilitator
5. Others as appropriate

**CONTRACTOR ROLE**

* Lead on design of the workshop
* Meet with RMI staff, and your other partners if necessary, in the weeks leading up to the workshop, in order to ensure we are aligned on delivery
* Lead on the facilitation of the workshop

**RMI ROLE**

* Lead on relationship management with Puerto Rico-based partners
* Provide input on design and delivery of workshop and co-facilitate small groups as
* necessary
* Create any documentation or reports necessary for the workshop and/or project, as well as lead on evaluation
* Organize logistics for the workshop, including invitations, communications to participants in advance of the workshop, room bookings, providing workshop materials and coordinating attendance

**PROPOSAL REQUIREMENT**

**Firm Background**

Please include firm’s name, address, contact information, biographies of key staff members, and firm history. Please also include who will serve as primary point of contact and who would participant in the design and/or execution phases of the work.

**Project Approach**

Please provide a brief overview of how you will approach this project, including a statement of your firm’s facilitation philosophy.

**Experience/Work Samples**

Please include the following:

* 1. A summary of your firm’s completed projects of a similar scale and/or for clients similar to Rocky Mountain Institute.
  2. Examples of prior experience with bi-lingual facilitation for multi-day workshops is required, with multiple listed examples preferred.
  3. At least one in-depth case study with references

**COST PROPOSAL**

The contract will be developed in negotiation with the Contractor. The contract will begin at the time of execution, and conclude after the completion of the workshop. All intellectual property developed through this solicitation is property of Rocky Mountain Institute.

Proposals must include an estimated cost for all work related to tasks and deliverables outlined in the proposal, including travel and materials. Submissions are encouraged to offer a spectrum of cost options; cost-efficiency will be a consideration when evaluating proposals. This is solely a facilitation proposal; proposals should not make mention of catering, event space rental costs, AV rentals, etc.

**DEADLINE/TIMELINE**

Proposals must be digitally submitted by August 8th, 2019.

5:00 PM Mountain Time

Note: Submissions are reviewed immediately following the deadline. Applicants will be notified of selection by the week of August 19, 2019.

**SUBMIT TO / CONTACT**

Please send your proposal by electronic mail to:

Mark Silberg

Senior Associate

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