From: Rocky Mountain Institute
Subject: Request for Proposals (RfP)
Project: SDG-7 Platform – Distributed Energy for Development
Date: April 29, 2020
Deadline for response: May 14, 2020

Project Summary

Today, 840 million people have no access to electricity, and on current trends over 600 million will remain without access by 2030, most of these in sub-Saharan Africa. Many more people have only inadequate or unreliable access, holding back social and economic development.

There is a large opportunity to use distributed energy resources, including minigrids, to provide affordable, low-carbon, effective electrification for development. To date, the speed and scale of their deployment have been too slow. However, there is a growing evidence base that shows how we can capture the potential of these systems through a few, clear actions. With one decade left to achieve the U.N.'s Sustainable Development Goals (SDGs), there is a need to focus global attention on what really works on the ground, and to accelerate efforts to achieve SDG-7. The need for rapid progress, and the challenges of providing energy to distributed critical facilities (such as healthcare) have been thrown into sharp relief by the Covid-19 crisis.

Accordingly, The Rockefeller Foundation (RF) and Rocky Mountain Institute (RMI) are developing a visually compelling, interactive microsite to support decision makers in taking the right actions. It will do this by providing a narrative for why distributed energy should be adopted more quickly, laying out a simple toolkit for how to capture this opportunity, and linking to the best evidence, data and example projects available today. The platform is aimed at the governments and financiers (including donors) working to end energy poverty worldwide, who can benefit from this practical advice, and act accordingly.

RF and RMI are seeking a digital agency ("the agency") to refine the user experience and storyline, prepare interactive graphics for data visualization, and build the website. The agency should expect to work closely with the project leads at RF and the technical team at RMI already engaged in the project.

Please refer to Annex 1 for further background and detail on the project.

Audience groups

The primary audiences for this work are (in order of importance):

1) Governments and power sectors

High-level representatives and technical staff from ministries of energy, finance, development, and associated areas, as well as regulators and utilities of countries with energy access deficits, especially in sub-Saharan Africa. (Top priority countries are Ethiopia, Nigeria, and Congo.)

2) Donors and financiers
Staff of major international financial institutions (such as the World Bank or African Development Bank) and development agencies (such as GIZ or USAID) who are supporting energy access.

3) Multipliers
Organizations with strong outreach and influence among stakeholders and actors in the energy sectors of target countries; international NGOs and multinational companies with supply chains linked to rural communities in the target countries.

Scope of work

The project team will work closely with the design agency on refining the scope of work, through a collaborative and flexible approach throughout the project, seeking the best final outcome. It is suggested that the proposal should include as a minimum the following activities, covering both design and development of the platform:

Discovery
Develop an understanding of the sector and key players needs and "pain points", working through references and seeking out example projects that demonstrate either compelling graphics or a strong storyline.

Storyline and user experience (UX) design
Working closely with the teams at RMI and Rockefeller Foundation, refine the storyline shown in Annex 1 (table A1), to build a compelling and engaging narrative around energy access for development. This storyline should help create new insight and build a case for why and how our key audiences can take action, ideally positioning energy access as a solution to problems and pain points our key audiences have in mind, identified during the Discovery. Draw on the technical insights of the team and examples such as the Gates Foundation Goalkeepers reports. Prepare a UX plan based on this storyline, including the microsite structural outline and wireframes.

User needs assessment and testing
Build an understanding of user needs by participating in remote working sessions with at least five potential users of the platform, representing different national governments, utilities, or international financial institutions. RMI will identify the users and facilitate these interviews. There should be at least two rounds of user input:
  1) Early in the process, through dialogue interviews
  2) Once the initial structure and outline has been designed, allowing users to test some of the site features

Visual style

The site needs to feel clean, well-organized, and current. It is important that the impression of the site reinforces and validates the global relevance of this initiative, and establishes it as a go-to resource and authority on SDG-7 and distributed renewable energy. While we envision the microsite can be hosted within the new Rockefeller Foundation website (www.rockefellerfoundation.org - built through flexible components on WordPress) as a way to sustain visitors' traffic and engagement over time, this is not a requirement, and we expect the agency to recommend a route that will deliver the best user engagement and experience. The microsite can draw on the visual identity and style guides already in use on The Rockefeller Foundation website (see for example https://www.rockefellerfoundation.org/national-covid-19-testing-action-plan/ and https://www.rockefellerfoundation.org/2020-annual-letter/) by using the existing WordPress templates and leveraging our data visualization and storytelling tool Flourish. It will also be possible to adjust the code on the pages in collaboration with our IT agency to give additional possibilities for creative resources.

Visual content and data visualization

Working with the RMI team, prepare appropriate and compelling visual content that tells the story of energy access in a novel way, helping to generate understanding and insight. This should include both static and dynamic content, as well as 1-2 interactive visual design assets. These interactive assets might be infographics that respond to simple user input, for example. The data visualization may include seeking and rearranging video or photo content, though it does not include capture of new images. The data and mathematical models required for the figures will be developed by the RMI team, once the figures have been jointly outlined. The data visualization tool Flourish is already embedded into RF's website, and full access (enterprise version) will be made available for the project, but some of the final graphics are expected to go well beyond the capabilities of this tool. Flourish can be made available to the agency of choice independently of whether the site will be hosted on the Foundation's website or not – as Flourish data visualizations can be embedded in any web environment.

Site development

Build a simple website (microsite) based on the user needs, UX design, and storyline. New engaging content, including interactive infographics, videos and data visualizations can be embedded within the existing components of The Rockefeller Foudation's CMS - WordPress. (Agencies who have a compelling alternative to the use of the modules within this website are invited to submit suggestions – other options will be considered.) The final website should be clean, intuitive, flexible, and represent the global scope and reach of the work and the eventual users. The site itself will have limited content and be designed for non-expert users, but will link to detailed technical content hosted on external websites, especially www.seforall.org.

In its submission, and based on its understanding of site needs the agency should present its proposal for one of the following options: 1. working within the existing framework with WordPress and Flourish 2. Suggesting additional tools that would require more detailed work with the existing IT partner to code new modules in the backend or 3. Building a new site that is external from the RF domain. We understand that there are different budget considerations with

each of these options and agency submissions should be based on achieving the project objectives within the given timeframe and producing an exceptional final product that will also sustain user visits over time.

The site should also:
- Make content easier to digest at a glance by leveraging custom infographics and typographic treatment to relay message hierarchy;
- Be fully responsive, ensuring that touchscreen/mobile & desktop experiences are equally strong and up to current SEO trends;
- Have the ability to host downloadable pdfs, graphics, video and photo assets; and
- Have analytics set-up to measure user acquisition sources and behavior if hosted outside of the RF environment.

Content and copy
Working with the content developed by the RMI team, provide detailed review on the copy and content to be presented throughout the website. The site and text should allow for a French translation of the full site to be prepared separately in future, should the team decide this is a priority (note that the actual translation work is outside the scope of this RfP).

Training and handover
Provide adequate training on the use and future updates of the website, including full handover documentation.

Site launch
Test the site on both the development and production servers in preparation for launch. Carry out deployment of the site. Interface with RF, RMI and the communications agencies preparing a launch campaign for the website. Provide debugging and maintenance support for at least 40 days after the completion of training and launch of the final site.

Deliverables

Design deliverables
- Outline of the creative direction, including look and feel of the site (develop two initial directions, with subsequent two rounds of approval for the selected option)
- Narrative outline, UX plan and site wireframes, with two rounds of approval
- Definition of the site structure, including the number of page layouts
- Extension of the newly defined visual style
- Results and conclusions from the user needs assessments, and corresponding updates to design and structure
- Proposals for visual content, including existing resources and newly developed designs
- Outline and design of infographics, data visualization, and interactive visual design assets (three rounds of approval)

- Revision of the selected design based on client feedback

Development deliverables
- Programming of 3-5 dynamic data visualizations and 1-2 interactive visual design assets that can bring the site to life (two rounds of approval)
- Prior to launch, implementation of feedback from the client regarding usability and accessibility
- Website built and launched
- Site launch support and post-launch trouble shooting
- Set-up Google Analytics to measure user acquisition and behavior, if hosted outside of the RF environment.
- Training and written and video instructions for maintaining the site.

Compliance

All design must comply with website ADA accessibility standards, to ensure that all users have equal access to information and functionality. A good reference for the accessibility standards that could be followed is here: https://accessibility.18f.gov/. Page templates and graphics should be built allowing for content blocks to be shareable individually on social media, or downloaded and used in powerpoint presentations.

Proposal

Questions or requests for clarification should be submitted by email to sbackstrom@rmi.org by 5th May. A full list of responses to questions will be provided to all the bidders who have registered interest by May 8th, and will be available on request after this date.

Full proposals should be submitted by email to sbackstrom@rmi.org by midnight Mountain Time on May 14th 2020.

Timeline

RFP issued	April 29
Agency questions due	May 5
Answers to questions provided	May 8
Proposals due	May 14

Interviews	May 18-21
Agency selected	May 22
Estimated work start date	June 1

The agency should propose an appropriate timeline for delivery of the work, to meet the following deliverable deadlines:
- June 26 – site design and wireframes for user testing
- July 24 – user testing report, infographic drafts
- August 21 – full site draft user feedback
- September 9 – final delivery of UNGA version
- October 9 – delivery of final versions of website, documentation and training

Proposal requirements

Contact
The name of your firm's contact person for this project including their address, telephone number and e-mail address. This should be the person that can respond directly to questions about the information provided in your proposal, if any, and/or provide additional information, if needed.

Experience
Please provide a brief history of your firm and your past experience. Please include links to relevant work in your portfolio that demonstrate planning, design and execution of web development projects – ideally including interactive data visualizations. Include contact information for a minimum of two (2) references for which your firm has provided services similar to those described in this RFP.

Capacity
Outline of the team composition and expected dedication of team members.

Approach
Each response to this RFP should provide the following (maximum: 4 pages):
- An initial sketch outline, showing some characteristics of the website you would seek to design.
- A draft project implementation plan including a project timeline between contracting in May 2020 and the expected project launch in mid-September 2020.

Budget

Please provide an appropriate level of detail in the budget. As a minimum, please explain your fee breakdown for each of the following areas:
- Design
- Development
- Reimbursable expenses (please include a brief description)
- Hourly rate for out-of-scope work

Proposal Evaluation

Proposals will be evaluated against the following criteria:
1. Portfolio and prior work (25%)
2. Demonstrated capacity and qualifications of the prospective firm to perform the work, as well as client references (20%)
3. Approach to the project, including a thoughtful response to the objectives outlined in the RFP, with attention to deliverables and details. (30%)
4. Financial proposal (or formula) for the work. (25%)

Annex 1 – Project Outline

Context

Traditional grid roll-out can be expensive, unreliable, and slow to reach many underserved areas. Universal access based on solar lighting alone doesn't power full social and economic development. Standalone minigrids, solar systems to power productive uses, interconnected minigrids, efficiency, and other weak-grid solutions (collectively: distributed energy resources, or DERs) have an essential role to play in providing universal energy access. They can be used to build the grid of the future, which is more affordable, resilient, and effective at powering development. Renewable DERs providing low-carbon energy access will become important components of climate change agendas for many countries.

The role of DERs in providing energy access for economic development has been widely recognized: pilot projects are giving way to major funding programs for minigrids, while utilities are testing innovative business models and systems. However, progress is still too slow, and current trends will leave hundreds of millions without access in 2030. What is more, the immediate need for resilient healthcare and other critical facilities to deal with the growing Covid-19 crisis have shown the limitations of purely grid-based planning, and the benefits of quickly mobilizing distributed energy resources.

National governments don't have the confidence to take major funding decisions in new areas, where few have experience and best practices are still emerging. Donors aren't aligned on what they fund, or how they support government plans and each other's programs. Projects are fragmented and often don't consider the best available solutions or knowledge base. Overall, DERs are failing to reach scale at the speed required, and too few are benefiting from their transformative potential. With ten years left to meet the Sustainable Development Goals, the 2020 U.N. General Assembly can be used to focus attention and drive progress on the actions that make a real difference.

Approach

There is now a strong evidence base for the value distributed energy systems can add, if they are properly incorporated into planning and funding decisions. Intensive research and piloting have shown which approaches to program and project design are most effective, and what corresponding support is needed. A short list of actions by governments and funders can dramatically improve the effectiveness and speed of electrification with distributed resources.

Bringing together the best available knowledge and crafting this research into a visually compelling, online resource can clearly demonstrate why integrating distributed energy is important. A clear storyline, powerfully communicated, can direct the attention of decision makers toward the key actions that must be taken.

Condensing the evidence base into a short set of clear recommendations can show decision makers which actions they need to take, to capture the full potential of DERs. Targets and metrics around energy services can help ensure energy access translates to development outcomes,

while transparent assessment of real experiences and project outcomes can build confidence in decisions. A common understanding of general needs can be adapted for local contexts to build alignment and create a shared vision across the sector.

Structure

At a first level, the platform will be focused on providing a compelling case for action ("why"). At a second level, the platform will outline key actions and a provide users with a toolkit of practical, effective solutions ("how"). Finally, it will link to key information sources, example projects, and practitioners to support taking action. Table A1 shows the proposed information and outline of the website.

Table A1 – Proposed outline of content for the microsite.

Storyline flow	Linking to actions	Linking to examples
0. The urgency of energy access Act as a "hook", to draw people to the rest of the site's contents. Give a primer stressing the urgency of action and the broad outlines of the challenge.	Direct readers to actions below	-
1A. Energy and development are closely linked Make the "human" case for why access is so important. Demonstrate why existing approaches are insufficient, and build an evidence base for why better energy supply is essential.	**4A. To unlock this future, the right actions need to be taken** Make it clear that there are simple steps to capturing the enormous benefits of distributed energy, based on the new technical solutions and our improved understanding of the sector today. Link to more detailed resources.	**4B. Crucial countries are already addressing parts of this** Show where different countries are leading the way in key areas; focus on examples from 5 high-priority countries.
1B. Energy access is a good investment Make the "economist's" case for why access is so important. Make a convincing case for prioritizing energy investments based on their direct impacts on jobs and GDP, and the national return on investment.		
2A. Distributed energy is an essential part of the solution Start rallying people around the "new" sets of solutions that can make this happen quickly, at scale. Build a common understanding of on- and off-grid distributed energy working together, and show the system benefits.		
2B. Distributed energy and access are vital parts of the COVID-19 recovery Show how the response to the coronavirus and associated economic crisis can leverage distributed energy for resilient healthcare power supply and as a crucial part of enabling the economic recovery.		
3. The new approach to ending energy poverty Show that the future is already here: new approaches and techniques have been demonstrated and countries are starting to capture the benefits. Draw readers to the technical details and actions needed.		

Users
The platform will be used by representatives of recipient governments, donors, and "multipliers", including multinational development actors, global NGOs, media, and businesses.

Extensive consultation and involvement of key users in the design stage will ensure that both format and content meet their needs and expectations. This means partners will be able to use it extensively in their own communication and decision making. These users will also form part of a coalition championing the final platform, sharing it with others and driving uptake.

Users will access the platform for a range of reasons. Some will use the resource to build convincing storylines for stakeholders, while others will look for a knowledge base to inform and direct decisions around policy, programs and funding streams. Still more will look to it as a library of the most effective projects, or a way to find successful practitioners with experiences to share. In all cases, it is designed to help effective actions be taken by the users.

Development and launch
The platform will draw on a wealth of data and information from recent studies, bolstered by analysis on key areas, and transformed with compelling data visualizations. Technical development will start in March 2020, and digital product development soon afterwards. A final platform will be aim for delivery in mid-September. Following the launch, the platform will be shared extensively and used as a core resource by actors in the space.

Project Team
The project will be led by The Rockefeller Foundation, Rocky Mountain Institute, and Sustainable Energy for All. A broad cross-section of interviewees will give input and form the basis of a future coalition to champion the platform. In addition, a few institutions will be invited to form an advisory group that will meet regularly and guide the project, including: The World Bank; the Energy for Growth Hub; the Global Commission to End Energy Poverty; and Power for All