



Request for Proposals

Consultancy services to revise existing and create new RMI Policies

Location:	Remote until further notice, see Travel section
Type of Contract:	Contract for Professional Services
Anticipated Duration:	15 February 2021 to 14 May 2021
Payment terms and estimated days:	The consultant will be remunerated by RMI and will work up to 40 days with possible extension
Languages required	English
Supervision:	Chief Financial Officer will be the direct supervisor but work closely with the Compliance Manager, Senior Director of Program Services, General Counsel, Financial Controller and Human Resources Manager

Background

Rocky Mountain Institute (RMI) transforms global energy use to create a clean, prosperous, and secure low-carbon future. That is our mission. That is our passion. And every day, every member of our team of 300 works tirelessly to achieve it. We are driving the global energy transition from fossil fuels to energy solutions focused on electrification, deep efficiency, and renewables by working in partnership with businesses, communities, institutions, and entrepreneurs to advance market-based solutions. We achieve this by developing breakthrough ideas, testing and refining them, reshaping markets, and bringing solutions to scale. RMI is an independent 501(c)(3) nonprofit organization with an annual budget of more \$71 million and offices in Basalt and Boulder, Colorado; Oakland, California; New York City; Washington, D.C.; and Beijing.

Objective

Review, revise, and in some cases create new policies for RMI in line with international best practices and incorporating comments received from recent due diligence assessments conducted by third parties. This process will ensure that RMI's policies are clearly written, strengthened and robust. Currently, RMI has over 30 written policies, another 40 policies either in progress or needed but not started. Approximately 20 policies have been identified for creation, updating and/or completion by this consultant; please note that this list may evolve or be modified at any time. The policies include, but are not limited to, non-profit operating policies (e.g., Gift Acceptance Policy), finance policies (e.g., Combatting Finance of Terrorism Policy), people policies (e.g., Social Inclusion Policy) and Information Technology policies (e.g., Document Retention Policy).



Scope of Work

Activity 1: Inception Work Plan (Estimated activity: approximately 5 workdays*)

Task 1: Review background documents, which include due diligence reports undertaken by prospective funders, meet with key stakeholders to understand current state and needs. Carry out an assessment and review all existing Policies, identify gaps and areas which may be in addition to the current list of Policies needed. Ensure a participatory process in coming up with revised and new Policies.

Task 2: Provide guidance on necessary Policies to build capacity gaps and strengthen RMI's operational systems.

Activity 2: Revise and create RMI Policies. (Estimated activity: approximately 25 workdays*)

Task 1: Revise any RMI Policies, as needed.

Task 2: Create identified new RMI Policies, as needed, while ensuring no overlap or at the very least, reference to current RMI Policies.

Task 3: Submit drafts to supervisors and key stakeholders as Policies are revised and created.

Activity 3: Finalize RMI Policies. (Estimated activity: approximately 10 workdays*)

Task 1: Incorporate all applicable feedback from reviews of draft Policies.

Task 2: Finalize all Policies for publication and communication to RMI.

*One workday is equivalent to eight hours

Deliverables

The following is a list of key deliverables and estimated delivery:

Activity	Deliverable	Timeline
Activity 1	Inception work plan	5 March 2021
Activity 2	Revise and create RMI Policies	16 April 2021
Activity 3	Finalize RMI Policies	14 May 2021



Travel

Unless COVID-19 restrictions are lifted, no travel is required for this consultancy. If COVID-19 restrictions are lifted, then travel to the RMI Boulder, Colorado office may be requested.

Proposal Submission

Interested qualified consultants are invited to submit a CV and a proposal that includes the following:

- An understanding of the requirements
- Methodology and work plan for performing the assignment
- Project delivery plans
- Team composition and task assignment (if applicable)
- Detailed reference list indicating the scope and magnitude of similar assignments
- Relevant services undertaken in the past three (3) years
- Registration and other relevant statutory documents

Technical and financial proposals will need to be submitted as separate documents. Financial proposals for non-qualifying technical proposals will not be opened.

Application Submission Details

Interested consultants must submit their technical proposal and financial proposal separately via email to cruh@rmi.org no later than January 27, 2021. The Subject line of the email should be titled: "RMI Policies Consultant - "Consultant's or Firm's Name".

Please send any questions before submitting a proposal by January 20, 2021 to cruh@rmi.org.

Disclaimer

Materials arising from the contract shall be property of RMI and cannot be used without prior written consent by RMI.