



RFP Release Date: August 31
Vendor Questions Due: September 16
Answers Posted: September 23
Proposals Now Due: October 11, 2022

Foundation Funding Consultant Request for Proposal

Summary

Vermont Energy Investment Corporation (VEIC), a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use, is seeking proposals to provide consulting services to increase foundation funding for the organization. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC now by **5p.m. EDT on October 11th, 2022**. VEIC will not accept responses submitted after **5 p.m. EDT**. Please submit your response via e-mail to Karla Salazar at ksalazar@veic.org with ***RFP Submittal for foundation funding consultant*** in the subject line.

VEIC will respond to individual questions regarding this RFP only as follows: VEIC will receive questions regarding requirements and scope of work up to **5 p.m. EDT on September 16th, 2022** via e-mail only, to Karla Salazar at ksalazar@veic.org with ***RFP Questions for foundation funding consultant*** in the subject line. When appropriate, please refer to the RFP page number and section heading for ease of navigation and response. VEIC will post answers on the VEIC website <https://www.veic.org/requests-for-proposals> no later than **September 23rd, 2022**. VEIC will not address questions submitted after **5 p.m. EDT on September 16th, 2022**.

VEIC Background

VEIC is a sustainable energy organization on a mission to generate the energy solutions the world needs.

For over 35 years, Vermont Energy Investment Corporation (VEIC) has been working with governments, utilities, foundations, and businesses across North America to develop and deploy clean-energy services that provide immediate and lasting change. VEIC has expertise in energy efficiency, building decarbonization, transportation electrification, and demand management for a clean and flexible grid. We design innovative solutions that meet clients' goals, while reducing greenhouse gas emissions. VEIC is nationally recognized for programs and pilots that optimize energy use, reduce energy burdens for low-income customers, and advance emerging technologies and innovative program models.

In addition to our full-service consulting business, VEIC administers three large-scale sustainable energy programs: [Efficiency Vermont](#), [Efficiency Smart](#), and the [DC Sustainable Energy Utility](#) (DCSEU), and serves on the program administration teams for [Focus on Energy](#) (Wisconsin) and [Hawaii Energy](#).

RFP Objective

This RFP seeks to identify a consultant that will develop a foundation funding strategy for the organization. The consultant will work with the VEIC team to identify the services and programs that would have a high likelihood of being funded and put VEIC on a path to secure foundation funding through relationship development and grant support. VEIC's initial thinking is that the foundation strategy will support our strategic goals around equitable decarbonization and innovation. Once determined, the consultant will work to identify target foundations and create the compelling narrative and collateral necessary to secure foundation funding. The ideal consultant will have significant experience providing these services to other non-profit organizations and have strong relationships with key foundations which might fund VEIC's work.

VEIC seeks to work with a consultant with demonstrated commitment to diversity, equity, and inclusion in their business practices and mission. We are committed to building a work community that is inclusive and represents a vibrant diversity of background, experience, perspective, and thought. Climate change impacts all of us; however, we are impacted differently based on our identities and experiences. We all deserve a place at the table to make decisions about our collective future – we hope you'll consider joining us as we work towards our vision for a healthy planet, thriving people, and energy justice. Candidates across all markers of identity (age, race, gender, ability, communication style, etc.) are highly encouraged to respond.

Scope of Work

By submitting a response to this RFP, the bidder acknowledges understanding and acceptance of this Scope of Work and agrees to fulfill all of its terms and conditions in the event of a contract award.

Phase I

1. Provide VEIC with a deeper understanding of why donors and foundations provide funding
 - a. Develop a process that will identify the portfolio of services VEIC provides or could provide which have the greatest opportunities for foundation funding
2. Conduct a landscape analysis of funding opportunities for VEIC
 - a. Provide insights into the climate philanthropy landscape
 - b. Develop a list of funders and foundations that represent high potential for funding based on VEIC's services
 - c. Conduct research on the top priority funders to inform fundraising strategy
 - d. Provide a report which identifies other similar organizations that may be seeking funding and analyze their strategies, funders and reports, suggesting ways to differentiate VEIC's pitch from competitors

Phase II

3. Develop a fundraising strategy for VEIC
 - a. Craft value proposition and key messaging to deliver to foundations or for use in grant applications
 - b. Develop the necessary information and collateral to be used to pitch foundations
 - c. Develop a template response to use for grant solicitations
 - d. Develop an engagement strategy for key VEIC team members (Senior Leadership Team, Board, Business Development)
 - e. Provide criteria to consider for selection of future VEIC board members, in order to leverage their connections for fundraising opportunities
 - f. Help VEIC identify the skills, resourcing, and investment requirements that will position the organization for success with foundations
4. Facilitate introductions with high-priority funders and foundation contacts
 - a. Organize meetings with key contacts
 - b. Help refine pitch deck, concept paper, and direct support on grant application process
 - c. Coach VEIC staff on message delivery

RFP and Implementation Schedule

VEIC will attempt to adhere to the following schedule but reserves the right to adjust the schedule as needed. Any changes to this schedule will be communicated through the VEIC website:

<https://www.veic.org/requests-for-proposals>

Update on RFP schedule and response deadline.

VEIC has extended the deadline for the RFP responses to October 11th, 2022.

Please see below for the updated RFP and Implementation Schedule. Responses to this RFP must be delivered by VEIC now by 5PM October 11th, 2022.

RFP Released	August 31 st , 2022
Bidder Questions Due	September 16 th , 2022
Answers Posted	September 23 rd , 2022
RFP Responses Due (update)	October 11 th , 2022
RFP Evaluation Period (update)	October 12 th -October 26 st , 2022
Finalist(s) Selected and Contract Negotiation (update)	October 26 th -November 7 th , 2022
Estimated Performance Period	November 7 th , 2022- November 7 th , 2023

Preparing and Delivering a Proposal

For ease and efficiency of review, VEIC has specified the requirements for submitting a proposal to this RFP. Vendors must follow, and be responsive to, all requirements of this RFP. Proposals should be clear and concise, presented in the form of a written response with sections and sub-headings. Proposals that are not in the required format or incomplete may be disqualified at VEIC's sole discretion.

VEIC reserves the right to verify any information contained in bidders' RFP responses, and to request additional information after RFP responses have been received.

Bidders are required to propose, and will be scored upon, the individual criteria summarized below.

Response Summary, Evaluation Criteria and Points for Proposals

Scoring Category/ Evaluation Criteria	Max Points
Foundation funding and strategy experience, and desired qualifications	25
Demonstrated strong relationships with key foundations	25
Quality of project plan, approach & ability to meet project timetable	25
Cost effectiveness	15
Diversity, Equity, Inclusion, and Justice experience (Eg, experience gaining funding for disadvantaged communities, advancing energy justice, or other)	10
Total Points = 100	

Response Requirements

Responses to this RFP must be delivered electronically to VEIC now by **5:00 p.m. EDT on October 11th, 2022**. Responses submitted after 5:00 p.m. EDT will not be accepted. Responses must be submitted electronically via e-mail to Karla Salazar at ksalazar@veic.org with **RFP Submittal for foundation funding consultant** in the subject line.

Responses must be no more than 25 pages in length, be formatted to standard letter paper size (8.5" x 11") with 1-inch margins all around and a common font set to 11-point or larger.

All responses must include a cover letter with the primary person's contact information. Email responses must have all the required information assembled into one (1) PDF file. Multiple files and/or file formats will not be accepted.

- A. Company Info:** name of the business, contact person, and contact information including full legal name, address, telephone, mobile telephone number, e-mail address, and website address, as applicable.
- B. Company Profile:** a brief company profile, not exceeding 500 words.
- C. Statement of Ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).
- D. Customer References** (1 page maximum): This section of the response must include a minimum of 3 customer references where the reference's project was similar in size and scope to the project defined within this RFP.
- E. Ability to Meet VEIC Objectives - Narrative:** a high-level narrative outlining your proposed approach for the work. The narrative should include, but not be limited to:
- Description of Proposed Solution
 - Overview of the Project Plan including Timeline and Project Phasing
 - Expected Participation from VEIC
 - A summary of how the business/organization is furthering its diversity, equity, inclusion, and justice efforts (DEIJ) and how they would apply DEIJ to this scope of work
- F. List of Staff to Perform Services:** list individuals or staff to perform services, and a description of individual experience relevant to the project objectives.
- G. Price Quote and Proposed Fee Structure:** pricing should be listed with individual lines per each area of focus or deliverable.
- H. Certificate of Insurance:** vendors must supply a current Certificate of Insurance showing evidence of General Liability. If awarded a Contract, the vendor will also be required to provide a final certificate of insurance to show compliance with the minimum insurance requirements outlined in the successful bidder's contract. VEIC anticipates the minimum requirements to be as outlined below but will confirm final insurance requirements prior to issuance of a contract. Bidders must raise any questions about the insurance requirements by the Bidder Questions Response deadline set forth above, and must identify any exceptions to the anticipated minimum requirements in their responses.

Insurance Policies	Limits
Commercial General Liability	\$1M per occurrence/\$2M aggregate
Automotive Liability	\$1m per occurrence single limit for bodily injuries and property damage (if driving will be authorized in performance of any part of the contract).
Workers' Compensation	Statutory mandates
Employer's Liability	\$500K per accident; \$500K per disease; \$500K policy disease limit

I. Disclosure of any pertinent litigation

A bidder must disclose any past or pending judgements, lawsuits, actions, bankruptcies or regulatory decisions or information that may adversely affect the bidders ability to meet any requirements of this RFP, any awarding contract, or the bidder's proposal. A bidder agrees to provide a detailed description of any of the above events and the applicable case or docket number in its proposal.

This disclosure obligation is an ongoing material obligation that applies from the date of proposal submission and through the expiration of any resulting contract aware. Failure to disclose pertinent litigation may result in the disqualification of the vendor's proposal.

J. Information Security Requirements: please review the Information Security Requirements (Appendix A) and provide a completed Information Security Questionnaire (Appendix B) with your response. VEIC will not consider any exceptions or request to negotiate terms that were not called out as exceptions to the security requirements in the RFP response.

K. Other Information: supplementary information may be attached to the RFP. Lengthy narratives should not be inserted into the body of a direct response.

L. Proposal Exceptions Summary: a proposal exceptions summary should be noted with the RFP response. Failure to note exceptions with the RFP submissions will be deemed to be acceptance of the terms of this RFP and terms noted in the VEIC Contract Template (Exhibit A). VEIC will take these exceptions into consideration when evaluating responses. If exceptions are not noted in the bidder's proposal but raised during contract negotiations, VEIC reserves the right to cancel the negotiations and award the contract to another bidder.

Budget

The total budget for this Scope of Work shall not exceed **\$95,000**. This includes all labor, materials, and reimbursable expenses. Proposals must include all expenses to be incurred by the bidder, the bidder's staff, and any subcontractors. VEIC is also open to pricing structures that are award based, but this should be added as another option and not in place of a firm, fixed price proposal.

Pricing and Pricing Basis

VEIC requires all bidder submissions to quote prices in USD, clearly stating any currency exchange rates/calculations used. Any discount offered by a bidder must be clearly identified along with the terms to which the discount is subject.

Payments by VEIC

All bidders must clearly state any assumptions and/or requirements relating to how payments must be made for software and/or services offered in their proposals.

Proposal Submission

Bidders must email proposals to the following address: ksalazar@veic.org

Please note that it is each vendor's responsibility to ensure that its proposal and all other required documents are received at the above address by the closing time and date specified above.

VEIC will be the sole judge of the qualifications of all prospective candidates and reserves the right to reject any and all submissions without recourse.

VEIC is aware that the information contained in the proposal indicates the bidder's current operations. Therefore, the use of this information will be confined to this request and the information will be treated as confidential.

Bidders shall bear all costs associated with preparing and submitting responses to this RFP and the subsequent evaluation phase. VEIC will, in no way, be responsible for these costs, regardless of the conduct or outcome of the prequalification process.

Treatment of Information

All information about VEIC provided during the RFP process shall remain under nondisclosure and cannot be released without the express permission of VEIC.

Note to bidders: VEIC may include separate nondisclosure documents at a later date.

Limitation

This RFP does not commit VEIC to award a contract or to pay any costs incurred in the preparation or submission of proposals. VEIC reserves the right to reject any or all proposals received in response to this RFP, to negotiate with any qualified vendor or to cancel in part or in its entirety the RFP, if any of these actions is deemed by VEIC at its sole discretion to be in VEIC's best interest.