

DEI Consulting Services Request for Proposal

RFP Release Date: **Oct 18, 2021**
Bidder Questions Due: **Nov 3, 2021**
Answers Posted: **Nov 5, 2021**
Proposals Due: (UPDATED) **Dec 10, 2021**

Summary

VEIC is seeking proposals from professionals or organizations for DIVERSITY, EQUITY AND INCLUSION (DEI) CONSULTING SERVICES. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **9pm EDT on December 10, 2021**. VEIC will not accept responses submitted after **9pm**. Please submit your response electronically via e-mail to: **lpelletier@veic.org** with **RFP Submittal for DEI Consulting Services** 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 **9pm EDT on November 3, 2021**, via e-mail only, to **lpelletier@veic.org** with **DEI Consulting Services RFP Question** 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 <http://www.veic.org/company/requests-for-proposals> no later than **November 5, 2021**. VEIC will not address questions submitted after 9pm EDT on November 3, 2021.

Background

Vermont Energy Investment Corporation

Vermont Energy Investment Corporation (VEIC) is a mission-driven, nonprofit organization dedicated to reducing the economic and environmental costs of energy use. It carries out its mission, in part, by designing and implementing innovative energy efficiency and renewable energy programs. Founded in 1986, VEIC is nationally and internationally recognized for advancing energy efficiency, energy conservation, and renewable energy programs and projects across the United States, Canada, and Europe. VEIC employs 280 professionals and is headquartered in Winooski, Vermont. It has offices also in Washington, DC, and Ohio. For additional information, please see the VEIC Website: www.VEIC.org

Over the last several years, VEIC has invested in a number of initiatives focused on improving the organization's diversity, equity, and inclusion practices. This work has included a variety of inward-facing and outward-facing initiatives including: launching a culture committee with a DEI specific working group; offering trainings to VEIC Board of Directors and staff; investing in "real-talk" conversations on DEI topics; revising its annual employee engagement survey to

provide a snapshot into understanding our employee experiences related to inclusion and belonging; becoming a **Just-labeled** organization, committing itself to corporate transparency on social justice and equity indicators; and adopting a **Social Vulnerability Index** across our entire organization to measure the impact our work has on underserved communities.

VEIC is committed to continuing this work and ensuring **social and energy justice principles**, justice and fairness are embedded in everything we do. We see opportunities everywhere to create new tools that can help us build the kind of company—and the kind of society—we want to see. We are committed to increasing accessibility of programs and services in the jurisdictions where energy efficiency and decarbonization implementation is occurring.

Proposed Scopes of Work

VEIC is seeking proposals from professionals or organizations (individuals or firms) to design and implement a comprehensive workplan to inform how we can best approach DEI at the corporate level and to work directly with VEIC's various business units or regional offices on specific tasks related to DEI and/or cultural initiatives.

The professionals or organizations selected through this RFP will be awarded an Indefinite Quantity Contract (IQC) which will include a general scope of work, budget, and timeline. Specific tasks will be authorized by VEIC in a Work Order issued pursuant to the IQC. Each Work Order will include a specific scope of work, budget and timeline.

The total dollar amount of the IQC awarded through this RFP is anticipated to be **\$100,000 - \$150,000 per year** or **\$300,000 for the two-year period**. VEIC may continue this work beyond the two-year period by extending the IQC for an additional year.

Scope of Work #1: VEIC Corporate Work

VEIC plans to pursue a holistic approach towards DEI. This work will require the specific expertise, guidance, external perspective, and dedication of a DEI professional or organization. VEIC anticipates that this work will include the following short and long-term corporate initiatives however VEIC encourages bidders to submit proposals that will help VEIC identify additional initiatives it should include to promote DEI based on VEIC's organizational core values and strategic goals. The below Scope of Work will take place over the next year or two, likely starting with an assessment of the state of DEI at VEIC, proceeding to support with drafting a DEI plan and goals, providing advice, support, and mentorship to VEIC's Board, leadership team and members of its staff, and helping VEIC implement DEI and advise on cultural initiatives on an as needed basis.

- 1. Assessment:** Assist VEIC in preparing for and conducting an organizational baseline assessment report regarding the state of DEI at VEIC, including insights into the state of DEI within its various business units and regional offices located in Vermont, Washington D.C., and Ohio, and various remote locations. This work will include, but is not necessarily limited to evaluating VEIC's strengths, weaknesses, opportunities, and threats with respect to DEI to gain a better understanding of:
 - A. The current level of awareness and understanding about key DEI principles such as conscious and unconscious bias, sensitivity, self-awareness and culture competency among staff and Board members.
 - B. Evaluating VEIC's policies (beyond non-discrimination) to identify any gaps or opportunities to help meet VEIC's organizational DEI goals.
 - C. External and programmatic consideration for our clean energy programs (beginning with the statewide energy efficiency program Efficiency Vermont (background and work outlined in Scope of Work #2 below) and expanding to include additional scope(s) as necessary), and
 - D. Identification of other areas for improvement.

The assessment report must include specific objectives and measurable outcomes. VEIC will use the report as a reference when later assessing progress against goals.

2) DEI Committee Support: Collaborate with our Senior Leadership Team (SLT) and our DEI Coordinator (to be hired) to develop a company-wide DEI committee (DEIC) and to assist in articulating a clear set of DEI goals and draft an action plan with specific activities, as they relate to our DEI North Star and baseline assessment. We envision the consultant working with the DEIC to design clear and measurable DEI goals for VEIC, along with an action plan that would include the change management approach, timelines, and detailed descriptions for the kinds of activities that will be implemented within VEIC to promote DEI. Depending on the topic, activities may be designed as interactive workshops or training opportunities with staff and the Board, targeted training for the DEIC, or expert advisory on DEIC recommendations to improve VEIC's organizational policies and procedures. It bears noting that a sizable portion of staff, including DEIC members, as well as Board members, are based in Vermont, Washington, DC, Ohio, and various remote locations, as this may inform approaches to collaboration.

3) DEI Action Plan Implementation: Partner with our DEI Coordinator and staff (in departments and EEU's) to implement the DEI action plan. The consultant will work with VEIC to implement the DEI plan and cultural shift within the organization. Collaboration with staff may require a variety of activities ranging from facilitating sensitive discussions about race and bias, to specific training opportunities for staff. to building capacity for intercultural awareness and communication among staff and the Board and updating VEIC various policies.

4) Corporate DEI Support: Provide ongoing advice, support, and mentorship to strengthen VEIC's internal efforts. We are cognizant that even with the DEIC and a sound DEI plan in place, there may be additional needs for DEI support. For example, we may identify additional needs

for workshops to address specific topics, or we may identify a certain organizational policy in need of an update. Should these needs arise, we would like to rely on the support of a team that is familiar with VEIC and our DEI work well enough to be able to jump into the work without the need to be introduced to the context.

5) Corporate Cultural Support: On an as needed basis, provide advice, support, and mentorship to VEIC's Culture Committee (VCC) Co-Chairs to help advance VEIC's cultural goals and initiatives. VEIC is committed to creating a culture of trust, respect, and accountability across the organization. We recognize a key piece of this work will involve establishing a culture of belonging which may overlap and/or intersect with VEIC's DEI work at times. The selected bidder will work with the Co-Chairs, on an as needed basis, to provide advice, support and mentorship on cultural initiatives.

Scope of Work #2: Efficiency Vermont

VEIC operates the Energy Efficiency Utility (EEU) Efficiency Vermont under an Order of Appointment issued by the Vermont Public Service Board.

Efficiency Vermont is committed to reducing energy burdens that disproportionately impact disadvantaged communities in Vermont. To evolve and grow in this space, Efficiency Vermont is seeking to secure DEI consulting services to provide organization-wide assessment of current practices, to assist the organization in refining its DEI plans, and to help begin the implementation of the necessary organizational change named in the plan.

Performance period is from January 2022 through December 2022, with an expectation that implementation tasks may continue through December 2023. The Contractor will provide, at a minimum, the following services in support of Efficiency Vermont's DEI efforts:

General Tasks:

- Attend kick-off, project check in and status meetings, and wrap up meetings
- Interview staff, internal stakeholders, and key external stakeholders to understand current practices
- Identify focused areas of program, service, and partnership improvement based on interviews and assessment of the current state and deliver a summary of recommendations for focus.
- Refine existing Efficiency Vermont DEI action plan based on abovementioned recommendations

Tasks specific to Programs & Engagement:

- Facilitate an understanding of the unique needs and barriers faced by disadvantaged communities in Vermont including Black, Indigenous, and People of Color (BIPOC), low income, high poverty, linguistic isolation, high transportation cost burden and/or low access, and high energy cost burden and low access, among others
- Assist in developing an equity impact assessment for evaluating all new and proposed programs
- Evaluate the merits of creating a compensated customer review panel to provide feedback in the product development process
- Engage with groups that serve disadvantaged communities and with businesses owned by people of color to both learn and to share about Efficiency Vermont’s services
- Consult on programs content audit

Tasks specific to Partnerships:

- Assist in the identification of community groups and networks to engage with and to learn about how Efficiency Vermont might advance its understanding of DEI
- Provide reviews of energy equity tracks for presentations at BBD and BPX

Tasks specific to Policy & Regulatory:

- Facilitate the inclusion of community feedback for the development of potential DEI metrics, goals, or benchmarks in the regulatory process

Task specific to People, Staff, Culture:

- Consult on research on efficiency program DEI efforts and tactics nationwide, sharing findings and ideas in a central repository that can be used by staff
- Assess resource needs, for both on-going Efficiency Vermont staffing and budget, to support the DEI plan

RFP and Implementation Schedule

RFP release	Oct 18, 2021
Bidders Questions Due	Nov 3, 2021
Answers posted	Nov 5, 2021
RFP responses due	Updated: Dec 10, 2021

Selection of final round bidders	Updated: Dec 17, 2021
Deadline for final round bidders to give presentations or provide additional information as requested by selection committee	Updated: Jan 5, 2022
Final bidder selected	Updated: Jan 10, 2022
Contract negotiations and signature	Updated: Jan 17, 2022
Performance period	From contract start date through December 31, 2023

Proposal Requirements

1. Organizational Information: Please include the following information about your organization:

- a. Full legal entity name, business address, and website address, as applicable.
- b. Years in business
- c. Public, private, or nonprofit status
- d. Primary geographic location of your business, and geographic location of any team members that would support VEIC in this work. Preference will be given to organizations that have a geographic proximity to VEIC offices, with the strongest preference to geographic proximity to Vermont in support of the Efficiency Vermont scope of work
- e. Contact person and contact information including name, phone number, and e-mail address
- f. Do you have other (non-employee) team members or associated organizations that will help you deliver services?

2. Narrative Proposal: Please include a brief narrative explanation of your organization and the service(s) you offer. Include any relative history or examples of clients or programs you have assisted with DEI work.

3. Cost and budget (5 pages maximum): In your response, please include a detailed budget. The budget for the Scope of Work shall not exceed \$300,000 for the two-year performance period. Please present a detailed budget that includes the following:

- a. Type of fee structure you propose for the services described in this RFP (flat rate, time and materials, etc.)

- b. Hourly or annual rates, as applicable
 - c. Any assumptions made regarding the Scope of Work that may have an impact on the budget
 - d. Any additional options, modules, or extra services
 - e. Overhead costs, administrative fees, licensing fees, or anything additional that will get included
- 4. References:** Please list at least two (2) separate past or current customers or clients, including job title and contact info for a representative, that can provide a reference.
- 5. Appendices:** Please include the following as labeled appendices to your proposal.
- Appendix A: Completed Vendor Information Security Questionnaire
 - Appendix B: Vendor Diversity Questionnaire

Evaluation Criteria

RFP responses will be evaluated using the following criteria:

• Description of approach and proposed services	30
• Geographic proximity to VEIC office(s)	20
• Responsiveness to RFP	20
• Cost and budget	20
• Experience in type of work	10
Total points available	100

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 bidder or to cancel in part or in its entirety the RFP, if any of these actions is deemed by VEIC in its sole discretion to be in VEIC's best interest.

Insurance Requirements

Before entering into a definitive agreement, the successful bidder shall be required to provide Certificates of Insurance to show that the following minimum coverages are in effect. Where applicable the Certificates of Insurance shall name VEIC as an Additionally Insured party. It is the responsibility of the successful bidder to maintain current Certificates of Insurance on file with

VEIC throughout the term of the definitive agreement. **Please confirm in your proposal your ability to meet these minimum insurance requirements.**

General Liability and Property Insurance:

\$1,000,000 per Occurrence

\$1,000,000 General Aggregate

\$1,000,000 Products / Completed Products Aggregate (where appropriate)

\$50,000 Fire Legal Liability

Attachment A: Vendor Information Security Requirements and Vendor Information Security Questionnaire

See separate attachments posted with this RFP

Attachment B: Vendor Diversity Questionnaire

VEIC is committed to supplier diversity and ensuring a diverse supplier base in the goods and services it purchases. VEIC also strives to have a supply chain that reflects the communities it serves. Please complete the following questionnaire and include your completed responses with your proposal.

Organization Name: _____

Total # of Employees: _____

Listed below are some widely used designations of diversity that can be certified. Whenever possible, please provide certification; if your business is not certified, please still answer in the way you would like to represent your business.

Check all that apply:

Small Business

Small Disadvantaged Business

Historically Underutilized Business (HUB)
Zone Business

Is your business at least 51% owned, controlled, and actively managed by any of the following? Please check as applicable:

Disabled Person(s)

Veteran(s)

LGBTQIA

Minority Person(s)

Woman/Women

If Minority-Owned, please check:

Black/African American

Native American/Alaskan Native

Latino/Hispanic

Asian

Native Hawaiian/Pacific Islander

Other (please specify)

Does your organization have a supplier diversity program, goal, or statement? Please include, reference, or describe.