



## Energy Literacy Project Implementation

### Request for Proposals

**RFP Release Date: 4/9/2024**  
**Bidder Questions Due: 4/16/2024**  
**Answers Posted: 4/19/2024**  
**Proposals Due: 5/3/2024**

### Summary

Efficiency Vermont, a statewide Energy Efficiency Utility operated by Vermont Energy Investment Corporation (VEIC), is seeking proposals from professionals or organizations to implement the **Energy Literacy Project**, described below. Responses to this Request for Proposals (RFP) must be delivered electronically to VEIC by **5 p.m. EDT on Tuesday, May 3, 2024**. Efficiency Vermont will not accept responses submitted after **5 p.m. EDT**. Please submit your response electronically via e-mail to: [mcrowley@veic.org](mailto:mcrowley@veic.org) with **RFP Submittal for the Energy Literacy Project** 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 Tuesday, April 16, 2024**, via e-mail only, to [mcrowley@veic.org](mailto:mcrowley@veic.org) **with Energy Literacy Project RFP Question in the subject line**. When appropriate, please refer to the RFP page number and Section Heading for ease of navigation and response. Efficiency Vermont will post answers on the Efficiency Vermont website no later than **Friday, April 19, 2024**. VEIC will not address questions submitted after **5:00 p.m. EDT Tuesday, April 16, 2024**.

### Program Overview

The goal of the Energy Literacy Project (ELP) is to promote energy education and literacy among Vermont's K-12 teachers and students while inspiring a lifelong commitment to environmental and energy stewardship. Program deliverables include:

- Inclusion of energy literacy into all subject areas in all grades.
- Administration and delivery of an Energy Literacy Certification program for teachers that includes continuing education credits.
- Delivery of learning resources for students and teachers such as curriculum-based workshops, hands-on learning, and home energy management practices.

- Opportunities for the K-12 community to apply their learning beyond the classroom through:
  - Information on responsible energy use at home
  - Information on Efficiency Vermont and Burlington Electric Department’s full suite of efficiency programs.
- All the deliverables above will be prioritized for areas of the state with the highest energy burden or social vulnerability.

## Background

### 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 over 350 professionals and is headquartered in Winooski, Vermont. It has offices also in Washington, DC, and Ohio. For additional information, please see: VEIC Website: [www.VEIC.org](http://www.VEIC.org)

VEIC is a **Just-labeled** organization, committing itself to corporate transparency on social justice and equity indicators. We’ve also adopted the **Social Vulnerability Index** across our entire organization to measure the impact our work has on underserved communities. With ongoing employee engagement in **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.

### Efficiency Vermont

Launched January 1, 2000, Efficiency Vermont helps ratepayers reduce energy costs, strengthen the local economy, and protect the environment by making homes and business energy efficient. Efficiency Vermont provides technical assistance, rebates, and other financial incentives to help Vermont households, businesses and other institutions—such as K-12 schools—reduce their energy costs with energy-efficient equipment, lighting, and approaches to construction and major renovation. Efficiency Vermont partners extensively with contractors, suppliers, and retailers of efficient products and services throughout the state.

VEIC operates Efficiency Vermont under an Order of Appointment issued by the Vermont Public Service Board. For additional information, please see the Efficiency Vermont website: [www.veic.com](http://www.veic.com)

# Scope of Work and Schedule

## RFP and Implementation Schedule

Table 1. Efficiency Vermont will attempt to adhere to the following schedule but reserves the right to adjust the below schedule as needed.

RFP release	April 9, 2024
Bidders questions accepted	April 9-16, 2024
Answers posted	April 19, 2024
RFP responses due	5:00 p.m. EDT, May 3, 2024
Bidder selected	May 10, 2024
Contract negotiations and signature	May 13 – May 31, 2024
Performance period	July 1, 2024 to June 30, 2027

## Scope of Work

Through this RFP, Efficiency Vermont is seeking a contractor that can provide comprehensive implementation of the ELP for the performance period of July 1, 2024 through June 30, 2027. By submitting a response to this RFP, the Bidder acknowledges understanding and acceptance of this Scope of Work and agrees to fulfill all its terms in the event VEIC awards the contract to the Bidder. Implementation of the ELP shall involve the following Tasks.

### Task 1. Contract Management

Contractor will maintain direct, ongoing communication with Efficiency Vermont’s Contract Manager regarding contract details and maintain alignment with Efficiency Vermont’s strategic objectives and implementation priorities, as communicated to the Contractor by Efficiency Vermont. The Contractor will document all activities related to the ELP and will produce at regular intervals both written (monthly, quarterly, and annually) and verbal reports (weekly or bi-weekly) showing progress in each of the six other Tasks described in this Scope of Work. Written reports will also involve a budget update, showing current expenditures and remaining money by Task.

### Task 2. Outreach and Enrollment

Contractor will perform targeted and proactive outreach to K-12 Schools (including vocational high schools), and enrollment into ELP programming. This outreach and enrollment must be in

alignment with Efficiency Vermont's strategic objectives and implementation priorities, as communicated to the Contractor by Efficiency Vermont. Efficiency Vermont places a priority on reaching a geographically and socio-economically diverse subset of Vermont schools, and places additional priorities on efforts to maximize administrative and implementation efficiencies through enrollment of entire districts or supervisory unions. This Task also involves responsive enrollment (for example, schools initiating contact with the program). Enrollment procedures will involve enough data collection to carry out tracking of Contractor activities and Program progress toward goals, and to complete post-program participation evaluations and analysis. (See also **Task 7: Tracking and Evaluation.**)

### **Task 3. Curriculum Development**

Contractor will develop grade-appropriate energy curricula that:

- a. Adhere to Vermont's Framework of Standards and Learning Opportunities.
- b. Align with the U.S. Department of Energy's Energy Literacy Framework (<http://energy.gov/eere/education/energy-literacy-essential-principles-and-fundamental-concepts-energy-education>).
- c. Encourage student development of 21st Century Skills (<http://www.p21.org/>).
- d. Engage students in flexible pathways for careers in skilled trades and energy management.
- e. Include Vermont-specific content.

### **Task 4. Curriculum Delivery**

Contractor will provide the delivery mechanism for curricula developed in **Task 3**, ensuring both student and educator engagement with learning materials. Curricula may be delivered in person or virtually, as agreed upon between Contractor and educator host. Contractor will utilize a standard assessment tool to measure energy literacy improvements of student participants. Contractor is encouraged to organize routing and scheduling in a manner that maximizes efficiency and minimizes GHG emissions for curriculum delivery. This might include reducing miles driven in single-occupancy gas-powered vehicles by grouping scheduled onsite presentations by location and/or considering virtual curriculum delivery when feasible.

### **Task 5: Educator Training and Development**

Contractor will provide energy literacy training for teachers, curriculum coordinators, and other educators, with a goal of empowering educators to integrate energy curriculum into lesson plans. Contractor may also provide in-depth workshops, follow-up support, or other professional development opportunities.

### **Task 6: Maintenance of Resources**

Contractor will maintain both electronic resources and physical materials necessary for supporting successful delivery of curricula. Such resources and materials must be accessible to educators via online portals or through well-defined request procedures. Resources might include, but will not be limited to, written resources, research and support documentation for curriculum lessons, and physical materials and learning aids to support specific lessons or units.

### **Task 7 Tracking and Evaluation**

Contractor will identify and utilize SMART criteria (Specific, Measurable, Attainable, Relevant, and Time-bound) to track and measure causal effects of the program activity. Contractor will perform the necessary data collection and analysis to measure progress toward project deliverables (also listed in **Program Overview**, above):

- Inclusion of energy literacy into all subject areas in all grades.
- Administration and delivery of an Energy Literacy Certification program for teachers that includes continuing education credits.
- Delivery of learning resources for students and teachers such as curriculum-based workshops, hands-on learning, and home energy management practices.
- Opportunities for the K-12 community to apply their learning beyond the classroom through:
  - Information on responsible energy use at home
  - Information on Efficiency Vermont and Burlington Electric Department's full suite of efficiency programs.
- All the deliverables above will be prioritized for areas of the state with the highest energy burden.

## **Preparing and Delivering a Proposal**

For ease and efficiency of review, Efficiency Vermont has specified the requirements for submitting a proposal to this RFP. Bidders 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 Efficiency Vermont's sole discretion.

Bidders are required to propose, and will be scored upon, the individual criteria summarized in Table 2. **Every bidder is required to include a Bid Summary Table based on Table 2** below with the specific value or information they propose for each of the listed criteria. The Bid Summary Table shall be presented as part of the narrative summary.

Table 2: Response Summary, Evaluation Criteria and Points

Scoring Category/Criteria	Description	Max Points
<b>Expertise and Experience</b>	Expertise and experience in implementation of K-12 energy literacy education and training	35
<b>Completeness</b>	Responsiveness to all tasks in the Scope of Work and the Proposal Requirements	25
<b>Personnel</b>	Key personnel qualifications	15
<b>Cost Effectiveness</b>	Reasonableness of costs (and thus, likely cost-effectiveness)	15
<b>Vermont Experience</b>	Expertise and experience in implementation of K-12 energy literacy education and training in Vermont	10

## Response Requirements

- 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, including any subcontractors.
- C. **Statement of ownership:** the type of business entity (sole proprietorship, corporation, LLC, or other).
- D. **Narrative and Bid Summary Table:** a narrative outlining their approach to the Scope of Work and include proposed values or summary information for each of the scoring criteria listed in Table 2 above. (The values that the bidder provides in the bid summary table are its proposed values, which will not be binding on Efficiency Vermont. Efficiency Vermont in its sole discretion will determine the final values to be awarded to each bidder.)
- E. **Binding Transmittal Letter** (1 page maximum): Each proposal must include a binding transmittal letter signed by a party authorized to obligate the bidder to the services

described in their proposal. The letter must clearly identify the person authorized to serve as the organization’s representative for future communications regarding the response. The letter must state that the proposal is valid for 60 days.

**F. Budget** (5 pages maximum): Each proposal must include a detailed budget. The budget for the Scope of Work shall not exceed Three Hundred Thousand Dollars (\$300,000). Bidder must include in their proposal a description of any assumptions made regarding the Scope of Work that may have an impact on the budget. Labor rates may be attached as a separate appendix.

**G. Qualifications and Team Experience** (5 pages maximum): This section of the response must demonstrate the bidder’s team’s (including any subcontractors) knowledge, experience and ability to successfully complete the Scope of Work.

Provide details on the roles and responsibilities of key personnel and team members including any subcontractors. Experience should include certifications and trainings for key staff.

**H. Proposal Exceptions Summary Form.** A Proposal Exception Summary Form (see below) with exceptions to items in any section of this RFP or Efficiency Vermont’s Standard Contract terms and conditions. Failure to note exceptions on the Proposal Exception Summary Form will be deemed to be acceptance of the terms of this RFP and Efficiency Vermont’s Standard Contract terms and conditions in Appendix A. Efficiency Vermont will take these exceptions into consideration when evaluating responses. If exceptions are not noted in bidder’s proposal but raised during contract negotiations, Efficiency Vermont reserves the right to cancel the negotiations and award the contract to another bidder or bidders.

<b>RFP/ Contract Reference</b>	<b>Bidder’s Proposal Reference</b>	<b>Brief Explanation of Exception</b>
(Reference specific outline point to which exception is taken)	(Page, section, items in bidder’s proposal where exception is explained)	(Short description of requested exception)

1.		
2.		

**Certificate of Insurance.** Bidder must supply a current Certificate of Insurance showing evidence of General Liability. If awarded a Contract, bidder 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. Efficiency Vermont anticipates the minimum requirements to be as outlined below but will confirm final insurance requirements prior to issuance of a contract. The final certificate of insurance shall comply with the requirements outlined in Efficiency Vermont’s Standard Contract (**Appendix A**). Bidder must raise any questions about the insurance requirements by the deadline set forth above and must identify any exceptions to the anticipated minimum requirements in its response.

Insurance Policies	Limits
Commercial General Liability	\$1m per occurrence/\$2m aggregate
Automotive Liability	\$1m per occurrence single limit for bodily injuries and property damage
Workers’ Compensation	Statutory mandates
Cyber Liability Insurance	\$2m per occurrence/\$2m aggregate

Disclosure of any pertinent litigation

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



This disclosure obligation is an on-going material obligation that applies from the date of proposal submission through the expiration of any resulting contract award. Failure to disclose pertinent litigation may result in the disqualification of Bidder's proposal.

**Information Security Requirements:** Please review the Information Security Requirements listed in Appendix B and complete an Information Security Questionnaire (available at this [LINK](https://forms.office.com/r/VJgK5VRWNk): <https://forms.office.com/r/VJgK5VRWNk>) before the proposal due date. Failure to complete the Information Security Questionnaire before the proposal due date may result in the bidder's proposal being disqualified at Efficiency Vermont's sole discretion. Efficiency Vermont will not consider any exceptions or requests to negotiate terms that were not called out as exceptions to the security requirements in the RFP response.

## Limitation

This RFP does not commit Efficiency Vermont to award a contract or to pay any costs incurred in the preparation or submission of proposals. Efficiency Vermont 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 Efficiency Vermont in its sole discretion to be in Efficiency Vermont's best interest.