**Request for proposals**

**North America Grant Strategy and Execution for the InnoEnergy Skills Institute**

**EIT InnoEnergy**

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# Overview of EIT InnoEnergy Skills Institute

The InnoEnergy Skills Institute (IESI) is a leader in reskilling and certifying workers for energy jobs and empowering and preparing them to enter the workforce with 35 certifications and over 400 online training hours. The InnoEnergy Skills Institute successfully introduced its offering to the North American market two years ago. Since then, the passage of the Inflation Reduction Act in the US, and similar investments made in Canada and Mexico, are accelerating the commitments to build a North American battery value chain. With this comes the demand to source-train-hire skilled workers to meet the demand for new manufacturing.

With significant state and federal funding opportunities related to workforce development and clean energy, this is a critical opportunity for the Skills Institute to solidify its offering as an industry-leader and become a sought-after partner to deploy this programming across a wide audience.

The Skills Institute’s differentiated offering is uniquely positioned to support existing grant teams and partnerships and directly lead grant pursuit efforts. However, the recent influx of federal and state funding for workforce development, climate, and energy programs, combined with existing funding opportunities in these areas, demand expertise and resources to effectively pursue grant opportunities that now total $50B annually in the US alone. The Skills Institute must build capacity, plan, and execute a plan to leverage its first mover advantage via grants and external partnerships.

For more information about our company please visit the following website:

<https://www.innoenergy.com/skillsinstitute/>

# Scope of work

**General objectives:**

IESI objective for North America is to secure between $5,000,000 and $10,000,000 USD in grant awards serving as prime or partner in 2024. In addition, the Partner will help us leverage and enhance our leadership position in North America.

**Detailed work scope:**

1. *Ongoing Landscape Scan, Prioritizing, and Recommending Grant Opportunities*

The Partner will research and identify relevant grants to ensure InnoEnergy is prepared for new opportunities as they emerge regularly across various agencies and often have short application windows. The Partner will identify and track upcoming and available grants to develop an understanding of relevant opportunities including, but not limited to, federal, state, local, foundation, agencies, and organizations that align with InnoEnergy priorities and goals.

As part of these recommendations, the Partner will evaluate grant opportunities based on the

competitiveness of the Skills Institute’s positioning, funder priorities, and InnoEnergy’s ability and capacity to meet grant requirements and deploy awarded funds.

*Deliverables:*

● Baseline assessment of constraints and needs to inform strategy and priorities

● Framework for evaluating and prioritizing grant opportunities

● Recommendations of priority grants to pursue

1. *Skills Institute Value Proposition and Positioning*

Defining a differentiated value add is key to positioning the Skills Institute for funding and partnership opportunities. The Partner should provide differentiated narratives and approaches that the Skills Institute can use to position itself more attractively for funders and teams.

1. *Introductions and Partnership Development*

The Team will facilitate direct introductions to decision makers and key players to build connections within the workforce development and energy ecosystem including both grant funders and potential teaming partners.

*Deliverables*

* Introductions and connections with funders, the public sector, and project teams with a focus on US federal funding agencies – US DOE, US DOT, and others

1. *Grant Strategy and Proposal Development*

Provide services related to grant writing and management of the proposal development process, including the following deliverables:

* Identifying how InnoEnergy can deploy resources for pursuing the specific grant
* Prepare a project plan for the grant writing and application process, including timelines, requirements, and milestones to ensure a successful submission
* Attend applicable pre-proposal workshops/webinars and provide InnoEnergy team with information
* Research and provide interpretations of grant-specific guidelines and requirements
* Advise on partnership strategy including support on subcontractor vs. prime decisions, and make recommendations and connections for solidifying teaming partners and InnoEnergy’s role
* Lead building the consortium of partners, including support on subcontractor vs. prime decisions, developing a partnership strategy and managing the application materials of the partners.
* Write professional proposal drafts that follow grant requirements adhering to timelines and deadlines
* Prepare budgets and budget narratives to fund the proposed grant activities
* Ensure qualification and requirements are met including review of supplemental documentation
* Share feedback on content and submission materials in a timely manner
* Supporting the production of final application materials for InnoEnergy to submit

**Methodology and organization of work**

The Partner will report to the Head of Business Development in the North America office in Boston, Massachusetts. The Partner will function as a key resource to our team, participating in regular briefings bi-weekly or more frequently as needed depending on the project. The Partner will take the lead, with IESI, on key grant proposal opportunities as mutual developed and accepted.

**Timing and planning**

The expectation is that the Partner brings existing expertise, requires limited orientation time, and can act immediately on the opportunity. IESI requires a Partner with demonstrated achievement in federal and state grant writing and knowledge of the energy industry.

The contract's duration is 12 months. In case the budget coverage for future support for the services presently tendered, plus the continuing need for the services provided by the tenderer, EIT InnoEnergy intends to extend the contract with the winner/s of the present supplier selection process with another 12 months. The contract extension will be done through a direct award procedure. This extension is subject to financial coverage and high-quality performance of the contractor and continuous need for the services, but this does not bind EIT InnoEnergy to carry out an extension.

# Proposal Process

# *Participation*

1. Participation in this proposal procedure is open to all tenderers.
2. All participants must sign the Tenderers’ declaration form attached and submit it with the proposal. Please note that the tenderer may not modify the text, it has to be submitted signed as provided by EIT InnoEnergy attached to the request for proposal document.

# *Submission of proposal*

|  |  |
| --- | --- |
|  | **DATE (Calendar dates)** |
| **Sending out** **RFP invitations to the potential suppliers** | **May 2, 2024** |
| **Deadline for requesting clarification from EIT InnoEnergy** | May 7, 2024 |
| **Deadline for submitting proposals** | ***May 13,2024*** |
| **Intended date of notification of award** | May 15, 2024 |
| **Intended date of contract signature** | May 20, 2024 |

Proposals must be emailed English to the following address to:

**Contact name**: for the attention of Mark Vasu, Head of Business Development

**E-mail**: mark.vasu@innoenergy.com

**The proposal shall contain:**

* **the technical response to the service requested (point 3).**
* **the financial offer (the price for the services.)** The Financial offer must be presented in USD.
* **an indication of supplier’s insurance coverage.** The proposal must specify whether the supplier has taken out a company liability insurance and/or professional liability insurance including the maximum amount of coverage USDper event per insurance.

Responses should be concise and clear. The tenderer’s proposal will be incorporated into any contract that results from this procedure. Tenderers are, therefore, cautioned not to make claims or statements that they are not prepared to commit to contractually. Subsequent modifications and counterproposals, if applicable, shall also become an integral part of any resulting contract.

The tenderer represents that the individual submitting the natural or legal entity’s proposal is duly authorized to bind its entity to the proposal as submitted. The tenderer also affirms that it has read the instructions to tenderers and has the experience, skills, and resources to perform, according to conditions set forth in this proposal and the tenderers’ proposal.

*Tenderers are requested to submit their proposal together with the filled-out Tenderers’ declaration form (see point 4.1).*

# *Validity of the proposals*

Tenderers are bound by their proposals for 30 days after the deadline for submitting proposals or until they have been notified of non-award.

The selected winner must maintain its proposal for a further 60 days to close the contract.

**Proposals not following the instructions of this Request for Proposal can be rejected by EIT InnoEnergy.**

# *Requests for additional information or clarification*

The request for proposal should be clear enough to avoid tenderers having to request additional information during the procedure. In case the tenderers need additional information or clarification, please address it to the address below. **All information requested or answered may only be done through written communication – email only.** **All questions should be sent prior to the deadline for requesting clarification as specified in 4.2. In case of complex or high value procurements, EIT InnoEnergy could arrange a clarification session which will be communicated to the** **tenderers.**

**Contact name**: for the attention of Mark Vasu,

**E-mail**: mark.vasu@innoenergy.com

EIT InnoEnergy has no obligation to provide clarification.

# *Costs for preparing proposals*

No costs incurred by the tenderer in preparing and submitting the proposal are reimbursable. All such costs must be borne by the tenderer.

# *Ownership of the proposals*

EIT InnoEnergy retains ownership of all proposals received under this tendering procedure. Proprietary information identified as such, which is submitted by tenderer in connection with this procurement, will be kept confidential.

The potential or actual supplier should accept that during the implementation of the contract and for four years after the completion of the contract, for the purposes of safeguarding the EU’s financial interests, EIT InnoEnergy may transfer the proposal and the contract of the supplier to internal audit services, to the EIT, to the European Court of Auditors, to the Financial Irregularities Panel or to the European Anti-Fraud Office.

# *Clarification related to the submitted proposals*

After submission of the proposals, they shall be checked if they satisfy all the formal requirements set out in the proposal dossier. Where information or documentation submitted by the tenderers are or appears to be incomplete or erroneous or where specific documents are missing, EIT InnoEnergy may request the tenderer concerned to submit, supplement, clarify or complete the relevant information or documentation within an appropriate time limit. **All information requested or answered may only be done through written communication – email only.**

# *Negotiation about the submitted proposal*

After checking the administrative compliance of the tenderers, EIT InnoEnergy may negotiate the contract terms with the tenderers. In this negotiation EIT InnoEnergy will ask all tenderers to adjust the proposal or specific sections of the proposal within an appropriate time limit. In case of negotiation, EIT InnoEnergy shall provide further information about the proceedings and timing.

# *Evaluation of proposals*

The quality of each proposal will be evaluated in accordance with the award criteria below. The award criteria will be examined in accordance with the requested service indicated in Section 3 of the document.

*Evaluation criteria*

1. Project experience and competences of the members of the proposed project teams (maximum point: 20)
2. Methodology approach of project and proposed project implementation (maximum point: 20)
3. Liability exposure: tenderer with best insurance coverage and least changes to contract template shall receive the highest score (maximum point: 20)

***Total technical score:*** ***60 points maximum***

1. Price or total cost: lowest offered expert unit price shall receive the highest score, other shall be calculated in relation to that in linear equation (maximum point: 40)

***Total financial score: 40 points maximum***

**Total maximum score: 100.**

# *Signature of contract(s)*

The successful and unsuccessful tenderers will be informed in writing (via email) about the result of the award procedure.

For the contract, the Service Agreement in Annex 2 shall apply. Any change desired by the tenderer in the provisions contained in the body of this Service Agreement needs to be communicated to EIT InnoEnergy as part of the proposal of such tenderer. The background is that such desired changes must be considered in the evaluation of each tenderer's proposal under Liability Exposure above. Significant changes are likely to lengthen the negotiation process, making it less likely that the Service Agreement can be signed in time.

Within 3 days of receipt of the contract from EIT InnoEnergy, the selected tenderer shall sign and date the contract and return it to EIT InnoEnergy. Upon receipt, EIT InnoEnergy shall also sign and send back to the winner one signed copy. In case the winning tenderer is unable to enter the contract within the above-mentioned time period, EIT InnoEnergy may decide to contract the second best.

# *Cancellation of the proposal procedure*

In the event of cancellation of the proposal procedure, EIT InnoEnergy will notify tenderers of the cancellation. In no event shall EIT InnoEnergy be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a proposal procedure, even if EIT InnoEnergy has been advised of the possibility of damages.

# *Appeals/complaints*

Tenderers believing that they have been harmed by an error or irregularity during the award process may file a complaint. Appeals should be addressed to EIT InnoEnergy. The tenderers have *3* days to file their complaints from the receipt of the letter of notification of award.

# *Ethics clauses / Corruptive practices*

EIT InnoEnergy reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities, or fraud. If substantial errors, irregularities, or fraud are discovered after the award of the Contract, EIT InnoEnergy may refrain from concluding the Contract.

The supplier shall take all measures to prevent any situation where the impartial and objective implementation of the contract is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest (‘conflict of interests’). He should inform EIT InnoEnergy immediately if there is any change in the above circumstances at any stage during the implementation of the tasks.

# *Many journeys. One welcome.*

Diversity, inclusion, and equality of opportunity are core EIT InnoEnergy values. We are committed to extending the same warm welcome to everyone, whatever their personal journey. We strive to ensure every voice is heard.

We value the contribution that different viewpoints make to our business of innovation. Having a variety of perspectives at all levels also equips us to meet the needs of the diverse communities we serve.

We extend our commitment across the career cycle. We recruit people from diverse backgrounds—for example, as of 2022, we employed 39 nationalities split 50-50 male-female. We then ensure that every member of our team is involved, valued, and receives equal recognition and opportunities for advancement.

In all areas of the employee experience (including recruitment, compensation and career development), and in all dealings with customers and communities, EIT InnoEnergy staff will value merit regardless of age, social status, race, color or genetic features, disability, ethnic/social origin or national minority membership, gender, gender reassignment, sexual orientation, language, marital or partnership status, political or any other opinion, economic status, religion or spiritual belief.

Although we do not use this as a vendor selection criterion, we are interested in learning from others, and would be happy to receive anything about your Diversity values or policy that you would care to offer.

# *Annexes*

*Annex 1: Tenderers’ Declaration form.*

*Annex 2: Draft Contract Template.*