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INTERSTATE RENEWABLE ENERGY COUNCIL

Interstate Renewable Energy Council SolSmart Program Designation Platform Request for Proposal

This RFP is for the design of a designation platform for the SolSmart program (<http://www.solsmart.org>), administered by the Interstate Renewable Energy Council (IREC) and funded by the U.S. Department of Energy (DOE).

RFP Sent: April 27, 2022

Responses Due: May 20, 2022

We aim to select a developer no later than June 1, 2022. The beginning of the contract will depend on when we receive DOE funding for the project, but we hope to begin on June 1 or as soon as possible afterward. **The project must be completed by October 1, 2022.**

Send proposals and any questions on the RFP with Subject Line "Submission: SolSmart Program Designation Platform" to: SolSmart@IRECUSA.org.

If you have any questions on the proposal, please submit your questions to the email above. We will respond to all questions in a public forum accessible at <https://irecusa.org/requests-for-proposal-solsmart-program-designation-platform-and-solsmart-website/>.

Budget for the SolSmart designation platform shall not exceed \$140,000.

About Us

For nearly four decades, the [Interstate Renewable Energy Council \(IREC\)](#) has focused on making clean energy possible for millions of Americans, by identifying and removing regulatory, workforce, and economic barriers. IREC's organizational mission is to build the foundation for rapid adoption of clean energy and energy efficiency to benefit people, the economy, and our planet.

Since 2016, IREC has led the [SolSmart](#) program in partnership with the International City/County Management Association. SolSmart is a national program that helps local governments (cities, counties, and regional organizations) encourage the development of solar energy in their communities. The program offers no-cost technical assistance to help communities achieve their solar energy goals.

The core of the program is the SolSmart criteria, a list of local actions and policies that help reduce barriers to solar energy growth. Communities receive points for achieving each criteria, and those with a sufficient number of points are designated SolSmart Gold, Silver, or Bronze. A complete list of the SolSmart designation criteria and points awarded can be found in the [SolSmart Program Guide](#). Since the program launched, over 450 communities in 42 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands have achieved designation.

Project Overview

We are updating the SolSmart designation platform which tracks the progress of each community as they fulfill the SolSmart criteria. Once updated, communities will be able to log in to the platform, submit required information, and interact with SolSmart staff as they progress toward designation.

Separately, we are updating the SolSmart website (as detailed in a separate RFP) with the goal of seamlessly connecting the login-based platform with the public website, using complementary branding and aesthetics. A link to the separate RFP can be found here: <https://irecusa.org/requests-for-proposal-solsmart-program-designation-platform-and-solsmart-website/>. Coordination between the two vendors will be essential, and applicants are welcome to apply for both RFPs if they so choose.

SolSmart Designation Platform

We are currently using Salesforce for an internal program platform which tracks each community's progress toward designation. Additional data on the communities is stored on a separate Google Drive. The current platform is built in Salesforce Classic and only accessible internally to SolSmart staff. We seek to update this platform so that it allows for two-way interaction with communities and is integrated seamlessly with the SolSmart website.

The platform updates will include an application portal and dashboard that allows communities to see their application during the process; user types that allow communities and program staff to access the portal; and the ability to create reports based on community data.

Timeline for Selection

April 27, 2022	RFP distributed
May 20, 2022	Proposals due to IREC
May 26-27, 2022	Proposal presentations (invitation only)
June 1, 2022	Determination

October 1, 2022	Implementation complete
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Problem Statements

- We need an updated platform to account for retiring functionality of the current Salesforce Classic platform
- We need to make the platform accessible both to communities and program staff via a login
- We need dashboards and portals for platform users. We need communities to submit information and documents and check their progress via a dashboard
- We need efficiencies and streamlining for current practices within Salesforce, between Salesforce and other systems, and/or creating of new functionality in Salesforce to replace other systems
- We need updated user criteria to accommodate different roles and access levels on the platform
- We need the updated platform seamlessly integrated with the updated public website
- We need the updated platform to allow the public website to pull data for program dashboards
- We need a messaging system between all users, including new community users
- We need legacy data migrated to new system (legacy data includes approximately 200,000 records, 430 MB data storage, 450 MB file storage)

Scope of Services

Services to be performed under the awarded contract pursuant to this request for proposal include, but are not limited to, a review of the current SolSmart Salesforce platform, design of the updated platform, implementation/enablement, routine in-person or virtual meetings with SolSmart staff, coordination with the website design vendor, and report from the offeror that includes recommendation of the future state of the SolSmart platform that meets current and forthcoming operational needs.

Work Requirements

- Offeror must operate within a block of business hours in Eastern Standard Time (8:30 a.m. - 4:30 p.m. EST)
- Work should be completed in sandbox environment with opportunity for pre-launch testing of new ennoblements
- Weekly checklist report of tasks completed submitted via email
- Bi-weekly touch-base meetings with core SolSmart implementation staff members
- Comprehensive documentation of work to be performed and outcomes
- Dedicated user adoption support — the team needs to thoroughly understand how to use new features and process improvement considerations

Application Process

Please submit the following information with your proposal:

- Cover letter
- A description of your proposal and how you would meet the requirements in this RFP
- Statement of the organization's qualifications, including a sample of relevant work
- Contact information for three professional references
- Staff CVs of key personnel who will be involved
- Statement on your organization's diversity, equity and inclusion (DEI) principles and objectives

Selection Criteria

The applicant selected must have a clear understanding of the SolSmart program and must act as a partner in solar deployment by minimizing expenses and maximizing efficiency through effective feature enablement and user adoption support.

Upon notification of selection, the successful offeror is required to execute and deliver a contract within two weeks of notification. If the successful respondent is unwilling or unable to execute an agreement, IREC maintains the right to request another offeror to enter into a contract with IREC.

Selection criteria include:

- Cost
- Methodology: Please describe how your firm will approach the project with a detailed description, outline, and anticipated date of completion of each deliverable
- Quality assurance: Define schedule for routine progress meetings, allocate a portion of project timeline to end-user testing and adoption, documentation of completed deliverables, and knowledge base documentation for continued use of the organization and staff
- Experience with the design of similar platforms
- Demonstration of positive results with current and previous clientele
- Experience level and competence of staff who will execute deliverables
- Strong understanding of current business processes, platforms, and integrations used in the following processes: outreach, designation tracking, report and dashboard KPI development, email communications, acknowledgement tracking, duplicate data management
- Creativity and identification of additional strategic opportunities for growth and ease of completion for ongoing and repetitive tasks
- Adherence to a well-defined diversity, equity and inclusion (DEI) statement submitted with the application.
