

AGREEMENT FOR PUBLIC EDUCATION EVENTS & OUTREACH

This AGREEMENT FOR PUBLIC EDUCATION EVENTS & OUTREACH (“Agreement”) is executed by and between the University of Rhode Island Cooperative Extension having a principal place of business located at 3 East Alumni Avenue, Kingston, Rhode Island 02881 (“URI”), and the Rhode Island Energy Efficiency and Resource Management Council (“EERMC”), a council created by R.I. Gen. Laws § 42-140.1-3, for event and outreach services to be provided by URI for the benefit of the EERMC and for the EERMC’s payment therefor.

WHEREAS, pursuant to R.I. Gen. Laws § 42-140.1-3(b)(4), one of the EERMC’s purposes is to “[p]romote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated”;

WHEREAS, pursuant to R.I. Gen. Laws § 42-140.1-6(b), the EERMC is authorized “to engage consultants and professional services as necessary and appropriate to fulfill its purposes”;

WHEREAS, on May 4, 2022, the EERMC issued Request for Proposals #2022-02 entitled “2022 Public Education Events & Outreach” (the “RFP”) to solicit proposals from qualified offerors to support the EERMC in its responsibility of providing public education and outreach, which RFP is attached hereto as Exhibit A and incorporated herein by reference;

WHEREAS, on June 3, 2022, URI submitted a Proposal for Public Education Events & Outreach in response to the EERMC RFP (“Proposal”), which Proposal is attached hereto as Exhibit B and incorporated herein by reference;

WHEREAS, the EERMC selected URI as the successful bidder for the RFP on August 18, 2022, during its regularly scheduled and properly advertised monthly meeting, and;

WHEREAS, the EERMC voted to award a contract to URI, with a budget limit of Twenty Five Thousand Twenty Four and 14/100 Dollars (\$25,024.14)

NOW THEREFORE, in consideration of the foregoing recitals and the covenants contained herein, the EERMC and URI hereby agree as follows:

ARTICLE 1 – AGREEMENT TERMS

Unless otherwise stated herein, the terms of the Agreement shall be in accordance with the State of Rhode Island’s General Conditions of Purchase, 220-RICR-30-00-13, available at <https://rules.sos.ri.gov/regulations/part/220-30-00-13>, which are hereby expressly incorporated by reference into this Agreement.

ARTICLE 2 – RESPONSIBILITIES OF THE PARTIES

URI shall be responsible for completing all tasks and deliverables included in Section 5: Project Description and Scope of Work of the RFP.

EERMC shall be responsible for providing guidance to URI as requested and for approving invoices for payment.

ARTICLE 3 – SCHEDULE

This Agreement will remain in place for one year from the date of execution (“Initial Term”). Any work to be performed under this Agreement shall be commenced in accordance with the schedule specified in Exhibit C. URI shall prepare and provide updated schedules in writing as requested by the EERMC.

ARTICLE 4 – USE OF WORK PRODUCT

The parties agree that any and all materials generated by URI as a result of this Agreement will be with the support of EERMC funds. All such materials will be made available to the EERMC for future use by the EERMC, including but not limited to dissemination to the public in future education efforts. All materials must be provided in an editable format to the EERMC.

Any and all content generated in connection with this Agreement shall be the sole property of EERMC. URI hereby expressly waives any and all copyright claims to any content generated in connection with this Agreement. URI shall not use any materials, including but not limited to video content, generated or created in connection with this Agreement without the express, written permission of the EERMC.

ARTICLE 5 – CONTRACT PRICE

During the Initial Term, the contract price paid to URI for the work shall be as specified in Exhibit B, the attached Proposal (“Contract Price”). The Contract Price shall be all-inclusive for the work required by the relevant project cost and schedule in accordance with the Proposal attached as Exhibit B.

Hourly pricing shall be firm through December 31, 2023 The parties agree that EERMC may renew this Agreement for up to two (2) additional one-year periods if approved by the EERMC and agreed to by URI. If such a renewal is sought and agreed to, this Agreement must then be modified in writing accordingly.

ARTICLE 6 – PAYMENTS

URI shall submit monthly invoices for work completed during monthly billing periods or in accordance with the payment milestones otherwise stipulated in Proposal attached as Exhibit B. The EERMC shall be responsible for review, approval, or request for revision of all invoices. The parties understand and agree that all invoices approved by EERMC will be remitted to Rhode Island Energy for payment of invoices within forty-five (45) days of receipt. Invoices shall be submitted by URI to: Steven Chybowski (steven.chybowski@energy.ri.gov) and Rachel Sholly (Rachel.Sholly@gmail.com).

ARTICLE 7 – NOTICES

Notices required or permitted under this Agreement shall be sent to the following parties:

- | | |
|--------|---|
| URI: | Kate Venturini Hardesty
Outreach Programs Administrator
University of Rhode Island
3 East Alumni Ave.
Kingston, RI 02881
kate@uri.edu |
| EERMC: | Steven Chybowski
Chief Program Development - Energy Efficiency
Rhode Island Office of Energy Resources
One Capitol Hill, 4th Floor
Providence, RI 02908 |

Steven.chybowski@energy.ri.gov

Rachel Sholly
Education & Communication Lead
Optimal Energy – EERMC Consultant Team
10600 Route 116, Suite 3
Hinesburg, VT 05461
rachel.sholly@gmail.com

ARTICLE 8 – ENTIRE AGREEMENT

This Agreement, including attachments, constitutes the entire Agreement between the EERMC and URI with respect to the services specified. All previous representations relative thereto, either written or oral, are hereby annulled and superseded. No modification of any of the provisions of this Agreement shall be binding unless in writing and signed by a duly authorized representative of each party hereto.

ARTICLE 9 - NO JOINT VENTURE

The parties agree that this Agreement shall not create a legal partnership or joint venture.

ARTICLE 10 - JURISDICTION AND VENUE

This Agreement shall be exclusively governed by and construed in accordance with the laws of the State of Rhode Island. If any party to this Agreement shall bring any proceeding against any other party arising out of this Agreement, that party shall bring said proceeding in the Providence Superior Court of Rhode Island and each party hereby submits to the exclusive jurisdiction of that court for purposes of any such proceeding. URI hereby consents to personal jurisdiction under the terms of this Section for resolution of any dispute arising hereunder.

ARTICLE 11 – INDEMNIFICATION

The parties shall be solely responsible for the payment of all their employees, agents, servants, and independent contractors, in furtherance of this Agreement. URI hereby agrees to indemnify and hold the EERMC harmless from and against any and all claims, damages, penalties, or expenses, including attorneys' fees, incurred on account of any claim made by any employee, agent, servant, or independent contractor of URI with respect to services provided or work performed in connection with this Agreement.

ARTICLE 12 – EFFECTIVE DATES, AMENDMENTS AND TERMINATION

This Agreement shall take effect upon execution by both parties (“Effective Date”) and shall remain in effect for the Initial Term, unless earlier terminated.

Neither party may assign or transfer all or any portion of this Agreement without the prior written consent of the other party.

This Agreement may be amended or waived only by mutual written agreement by both parties.

Either party may terminate this Agreement at any time and for any reason by giving thirty (30) days prior written notice to the other party.

IN WITNESS WHEREOF, each party hereto has caused this Agreement to be executed by its duly authorized representative on the day and year set forth below.

RHODE ISLAND ENERGY EFFICIENCY &
RESOURCE MANAGEMENT COUNCIL

UNIVERSITY OF RHODE ISLAND

By: 

By: 

Its: Chair

Title: Dr. Marc Parlange
President, University of Rhode Island

Date: 2/20/23

Date: 2/6/2023

EXHIBIT A
REQUEST FOR PROPOSALS (RFP)

EXHIBIT A
REQUEST FOR PROPOSAL (RFP)

The Rhode Island Energy Efficiency and
Resources Management Council
("EERMC")

Request for
Proposals
("RFP")

RFP Title:	2022 Public Education Events & Outreach
RFP Number:	EERMC-2022-02
RFP Issuance Date:	Wednesday, May 4, 2022
Due Date to submit Questions:	Wednesday, May 18, 2022 at 5:00 PM ET

RFP Submission
Deadline:

Friday, June 3, 2022 at 5:00 PM ET

SECTION 1: GENERAL INFORMATION

- 1.1. **Summary.** The Rhode Island Energy Efficiency and Resources Management Council (“EERMC”) is issuing this request for proposals (“RFP”) to solicit proposals from qualified offerors to support the Council’s responsibility of providing public education and outreach on energy topics in 2022. Specifically, the EERMC is seeking an entity to plan, coordinate, facilitate, and market a Public Forum and a three-lecture Energy Lecture Series. In addition, the selected offeror will be responsible for coordinating with the EERMC to promote the Public Forum and Energy Lecture Series events.
- 1.2. **EERMC.** EERMC is a council authorized, created, and established pursuant to the laws of the State of Rhode Island (“State”). See R.I. Gen. Laws §42-140.1-3. EERMC council members are appointed by the State Governor with the advice and consent of the State Senate, and the Commissioner of the Rhode Island Office of Energy Resources (“OER”) serves as the EERMC executive director. See R.I. Gen. Laws §42-140.1-4. In accordance with R.I. Gen. Laws §42-140.1-6, EERMC is authorized to engage consultants and professional services as necessary and appropriate to fulfil its statutory purposes which are to:
- Evaluate and make recommendations, including, but not limited to, plans and programs, with regard to the optimization of energy efficiency, energy conservation, energy resource development; and the development of a plan for least-cost procurement for the State;
 - Provide consistent, comprehensive, informed and publicly accountable stake-holder involvement in energy efficiency, energy conservation, and energy resource management;
 - Monitor and evaluate the effectiveness of programs to achieve energy efficiency, energy conservation, and diversification of energy resources; and
 - Promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated.
- 1.3. **State Purchases Act.** In general, the State Purchases Act, R.I. Gen. Laws §37 -2- 1 et seq., applies to every expenditure of public funds by any State governmental entity or public agency within the State. EERMC, as a council established by the Rhode Island General Assembly, is issuing this solicitation and selection for award in accordance with the underlying purposes and policies of the State Purchases Act. Any prospective offeror or offeror who wishes to submit a written protest in accordance with R.I. Gen. Laws §37 -2-52, must submit the protest to the Commissioner of the Rhode Island Office of Energy Resources via mail or hand delivery to One Capitol Hill, 4th floor, Providence, RI 02908 or via email to energyresources@energy.ri.gov.

- 1.4. **Equal Opportunity Policy.** In accordance with R.I. Gen. Laws §28 -5.1-10, any selected offeror(s) who contract(s) with EERMC must possess the same commitment to equal opportunity as prevails under federal contracts controlled by federal executive orders 11246, 11625 and 11375. The selected offeror(s) may be required to submit an equal employment opportunity plan as proof of commitment. For more information, please contact the Rhode Island Equal Opportunity Office within the Rhode Island Department of Administration's Office of Diversity, Equity & Opportunity at 401.222.6398 or visit <http://odeo.ri.gov/offices/eoo>.
- 1.5. **Minority and Women Business Enterprises.** In accordance with R.I. Gen. Laws §37-14.1-4, small businesses owned and controlled by one or more women who are economically disadvantaged ("WBEs") or small businesses owned and controlled by one or more minorities who are economically disadvantaged ("MBEs") shall have the maximum opportunity to participate in all procurements of goods or services involving funds administered by EERMC .
- 1.6. **Disability Business Enterprises.** In accordance with R.I. Gen. Laws §37 - 2.2- 3.1, small, disadvantaged businesses owned and controlled by one or more individuals who have a disability ("Disability Business Enterprise") shall have the maximum opportunity to participate in all procurements of goods or services involving funds administered by EERMC.
- 1.7. **ISBE Utilization.** The term "ISBE" pertains to individuals who own small business enterprises and means all businesses that are certified as a WBE or MBE by the Rhode Island Office of Diversity, Equity & Opportunity ("ODEO") or as a Disability Business Enterprise by the Governor's Commission on Disabilities. In order for an offeror to receive credit for ISBE utilization either as an ISBE itself or through the utilization of a subcontractor that is an ISBE, the business must possess certification at the time the proposal is submitted to EERMC. To determine whether a business is certified by the State as an MBE or WBE or to become certified, please contact ODEO at 401.222.6398 or visit <http://odeo.ri.gov/offices/mbeco/>. To determine whether a business is certified by the State as a Disability Business Enterprise or to become certified, please contact the Rhode Island Governor's Commission on Disabilities at 401.462.0100 or visit <http://www.disabilities.ri.gov/>. Offerors will receive between 0 -6 evaluation points based on their proposed ISBE utilization rates. Each offeror must submit its proposed ISBE utilization rate as part of its proposal as instructed herein.
- 1.8. **Utilization of Subcontractors.** Subcontractors are permitted, provided that their use must be clearly indicated in the proposal. To the extent possible, all proposed subcontractors must be identified in the proposal.
- 1.9. **Public Disclosure of Proposals.** All proposals received by EERMC in connection with this RFP are subject to the Rhode Island Access to Public Records Act ("APRA"), R.I. Gen. Laws §38-2-1, et. seq. Once an award is made and upon receiving an APRA request, all proposals will be released

by EERMC unless EERMC finds that the certain portions of information contained within the proposals are exempt from public disclosure pursuant to R.I. Gen. Laws §38- 2-

2(4). Offerors are advised to clearly mark or label “confidential” any portions of information within their proposals that they believe are “[t]rade secrets and commercial or financial information obtained from a person, firm, or corporation which is of a privileged or confidential nature.” When responding to an APRA request, EERMC will take into consideration any information marked by the offeror as confidential. However, broad disclaimers that label the entire proposal as confidential will not help EERMC in its APRA analysis and may not be considered.

- 1.10. **Costs Associated with Submitting a Proposal.** All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the offeror. EERMC assumes no responsibility for these costs.
- 1.11. **Right to Cancel this RFP.** In accordance with R.I. Gen. Laws §37 -2-23, this RFP may be cancelled at any time and/or all proposals may be rejected.
- 1.12. **Misdirected Proposals.** Any proposals misdirected to other state locations, or which are otherwise not present in the office of the Contact Person at the time of the submission deadline for any cause will be determined to be late and may not be considered.
- 1.13. **Proposals Irrevocable.** Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the submission deadline, and may not be withdrawn, except with the express written permission of EERMC.
- 1.14. **EERMC Website.** Offerors are instructed to peruse the EERMC website, and any other pertinent websites listed in Section 2.1 of this RFP on a regular basis, as additional information relating to this solicitation may be posted there from time to time. See Section 2.1 of this RFP for pertinent website address(es).
- 1.15. **Right to Transact Business in Rhode Island.** In accordance with R. I. Gen. Laws §7-1.2-1, et seq., no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Department of State. Please contact the Rhode Island Secretary of State’s Business Services Division at 401.222.3040 or visit <http://sos.ri.gov/divisions/business-portal> for more information. This is a requirement only of the selected offeror(s).
- 1.16. **Availability of Funds.** The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds.
- 1.17. **Insurance.** Prior to being issued a final award, the selected offeror(s) will be required to possess all necessary insurance, as determined by the EERMC,

and continue to possess such insurance throughout the life of the award.

- 1.18. **Indemnification.** The selected and awarded offeror shall hold harmless and indemnify the EERMC and the State from and against any and all losses, damages, claims, suits, actions, liabilities, and/or expenses, including, without limitation, attorneys' fees and disbursements of any character that arise from, are in connection with or are attributable to the performance or nonperformance of the offeror or its subcontractors under an award stemming from this RFP.

SECTION 2: AGENCY CONTACT PERSON AND OFFEROR SUBMISSION AND FORMATTING REQUIREMENTS

- 2.1 **Contact Person.** Any communication regarding this RFP must be made in writing and directed to the Contact Person whose information is listed in the table below. Revised and/or additional information regarding this solicitation may be posted on the Pertinent Website(s) listed in the table below.

Contact Person	Steven Chybowski
Mailing Address	Rhode Island Office of Energy Resources One Capitol Hill, 4 th floor Providence, RI 02908
Email Address	eermc.rfp@gmail.com
Pertinent Website(s)	http://www.rieermc.ri.gov/

- 2.2 **Important Dates.** Important dates regarding this RFP are listed in the table below.

RFP Issuance Date	Wednesday, May 4, 2022
Pre- Proposal Conference Date	Not Applicable
Written Questions Due Date	Wednesday, May 18, 2022 at 5:00PM (Eastern Time).
Submission Deadline	Friday, June 3, 2022 at 5:00PM. (Eastern Time).

- 2.3 **Pre-Proposal Conference.** There will be no pre-proposal conference for this RFP.
- 2.4 **Written Questions.** Prospective offerors may submit written questions pertaining to this RFP. Questions must be emailed as a Microsoft Word or searchable PDF attachment to the Contact Person. The deadline to submit questions is listed within the table in Section 2.2 of this RFP. Questions and EERMC's responses will be posted on the Pertinent Website(s).

- 2.5 **Amendments to this RFP.** If this RFP is amended or addendums are issued, written notice of the amendments and/or addendums will be posted on the Pertinent Website(s).
- 2.6 **Submission Deadline.** Each Proposal will include three (3) components: technical, cost, and ISBE. All three components must be received by the Contact Person by the Submission Deadline as listed within in the table in Section 2.2 of this RFP.
- 2.7 **Submission Requirements.** Each Proposal must be emailed to the Contact Person and must include the following:
- One (1) original technical component.
 - One (1) original cost component. The original cost component must be a separate file from the technical component and be labeled as “Cost Proposal”.
 - One (1) original ISBE component. This original ISBE component must be a separate file from the technical component and be labeled as “ISBE Proposal”.
 - The electronic files must be in a searchable PDF or Microsoft Word format unless otherwise permitted by the Contact Person. Please label each file as “Technical Proposal” or “Cost Proposal” or “ISBE Proposal”.
- 2.8 **Formatting of Written Documents.** For clarity, the technical component should be typed and sections should be clearly labeled to correspond with the pertinent RFP sections. These documents should use 1” margins on 8.5”x 11” paper using a font of 12 point. Technical components should be a maximum of fifteen (15) pages not counting any attachments. Each attachment should be referenced appropriately within the proposal section and the attachment title should reference the proposal section it is applicable to. The Cover Sheet, Cost component and ISBE component should be typed using the attached templates.

SECTION 3: EVALUATION AND SELECTION PROCESS

- 3.1 **Technical Review Team.** Proposals will be evaluated and scored by a technical review team in accordance with the criteria contained herein. The chief purchasing officer, or the technical review team through delegated authority from the chief purchasing officer, will make a recommendation to the EERMC. An award shall be made to the responsible offeror(s) whose proposal is determined to be the most advantageous to the EERMC, taking into consideration price and the evaluation factors set forth in this solicitation. Offerors will be notified via email confirming that their submission is received. The EERMC is responsible for the final selection of an offeror. The EERMC reserves the right to award one, multiple, or no awards based on the proposals received. Offerors will be notified via email with the date that the EERMC will publicly award the proposal. The EERMC also reserves the right to reissue the RFP at its sole discretion.

- 3.2 **Technical Component Evaluation Stage.** To advance to the second stage of the evaluation process, which factors in the cost and ISBE components, the offeror must earn a technical component score of at least 55 (91.6%) out of the maximum 60 technical points. Any proposal with a technical component score of less than 55 points will not have the cost or ISBE components opened nor evaluated and the proposal will be dropped from further consideration.
- 3.3 **Cost & ISBE Components.** Proposals scoring 55 technical points or higher will be evaluated for cost and assigned up to a maximum of 30 points in the cost category. In addition, proposals scoring 55 technical points or higher will be evaluated for ISBE participation and assigned up to a maximum of 6 points in the ISBE participation category. If interviews are conducted, the potential maximum score equals 106 points.
- 3.4 **Scoring.** Proposals will be reviewed and scored based upon the following criteria:

CRITERIA	POINTS AVAILABLE
Overview and Work Plan	25
Qualifications and Experience	20
Project Management and Organization	15
Total Technical Points	60
Interview Presentation Quality	10
Total Possible Technical & Interview Points	70
Cost	30
Total Possible Evaluation Points	100
ISBE Bonus Points	6
Total Possible Points	106

- 3.5 **Calculation of Cost Points.** The offeror with the lowest cost proposal shall receive one hundred percent (100%) of the available points for cost. All other offerors shall be awarded cost points based upon the following formula:

$$(\text{lowest cost proposal} / \text{offeror's cost proposal}) \times \text{available points}$$

For example, if Offeror A is the offeror with the lowest cost proposal of \$65,000 and Offeror B proposes a cost of \$100,000 and the total points available are 30, Offeror A would get the full 30 points and Offeror B's cost points are calculated as follows:

$$\$65,000 / \$100,000 \times 30 = 19.5 \text{ points.}$$

- 3.6 **Calculation of ISBE Points.** See Sections 1.5, 1.6 and 1.7 of this RFP for more information. EERMC adheres to 150-RICR-90-10-1 entitled *Regulations Governing Participation by Small Business Enterprises in State Purchases of Goods and*

Services and Public Works Projects. The offer with the highest ISBE participation rate shall receive one hundred percent (100%) of the available points for ISBE. All other offerors shall be awarded ISBE points based upon the following formula:

$$\text{(offeror's proposed ISBE participation rate / offeror with highest ISBE participation rate)} \times \text{available points}$$

For example, if Offeror A has the highest ISBE participation rate of 20% and Offeror B proposes an ISBE participation rate of 12% and the total points available are 6, Offeror A would get the full 6 points and Offeror B's cost points are calculated as follows: $12\% / 20\% \times 6 = 3.6$ points. See Sections 3.7 and 3.8 of this RFP for information on how ISBE participation rates are calculated.

- 3.7 **ISBE Participation Rate if the Offeror is an ISBE.** The ISBE participation rate for an offeror who is an ISBE shall be expressed as a percentage and shall be calculated by taking the sum of the amount of the offeror's total contract price that will be subcontracted to ISBEs and the amount that will be self-performed by the offeror and dividing that number by the ISBE offeror's total contract price. For example, if the offeror's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs and will perform a total of \$8,000.00 of the work itself, the offeror's ISBE participation rate would be $(\$12,000 + \$8,000) / \$100,000 = 20\%$.
- 3.8 **ISBE Participation Rate if the Offeror is not an ISBE.** The ISBE participation rate for an offeror who is not an ISBE shall be expressed as a percentage and shall be calculated by taking the amount of the offeror's total contract price that will be subcontracted to ISBEs and dividing that number by the ISBE offeror's total contract price. For example, if the offeror's total contract price is \$100,000.00 and it subcontracts a total of \$12,000.00 to ISBEs, the offeror's ISBE participation rate would be $\$12,000 / \$100,000 = 12\%$.
- 3.9 **Interview Presentation.** Qualified offerors may be interviewed by the chief purchasing officer, or the technical review team, to present their proposals and qualifications in person or virtually, and answer any questions the chief purchasing officer, or the technical review team may have.

SECTION 4: OFFEROR'S SUBMISSIONS

Each offeror must submit a proposal containing the following information. When responding to each section below, please label responses with the corresponding RFP section.

- I. **Cover Sheet.** The offeror must complete, execute, and submit the

RFP Cover Sheet which is attached hereto.

- II. **Technical Proposal.** An offeror's technical proposal must include the following information:
- A. **Overview.** The overview should lay out the offeror's understanding of the scope of work, describe the offeror's proposed project work plan and approach, and explain how the offeror is well suited to achieve the project objectives.
 - B. **Work Plan.** The offeror should describe its proposed project work plan in detail. Specifically, the workplan must present a proposed timeline for planning and executing each event/initiative in 2022 – the annual public forum, and the energy lecture series, including proposed themes or topics for the energy lecture events. The workplan must also provide a description of how the offeror will address all components of the Scope of Work described in Section 5.
 - C. **Company Profile.** Provide an overview of history, length of time in business, organizational and staff capacity, core competencies, and any other resources uniquely suited to achieving project objectives.
 - D. **Relevant Experience:** Describe offeror's experience with similar projects.
 - E. **Examples of Prior Work:** The offeror should reference at least two examples of previous projects that best display the offeror's ability and experience with work of a similar nature. Specify the role the offeror played in each project.
 - F. **Reference Information:** Provide names, email addresses, telephone numbers, and permission to contact at least two former or current clients for which the offeror has performed work in the last three years.
 - G. **Identification of Staff and Subcontractors.** List all staff and subcontractors proposed as members of the offeror's team.
 - H. **Staff Responsibilities.** Specifically describe each of staff and subcontractor duties, responsibilities, and areas of concentration for the project.
 - I. **Staff Experience.** Please include resumes, curricula vitae, or statements of prior experience and qualification. An organizational chart showing roles and responsibilities on the project is desirable. The team may include subcontractors; however, the lead offeror will be solely responsible for the management and deliverables of the team.
 - J. **Conflicts of Interests.** Describe any known conflicts of interest between offeror or an affiliate of offeror and any distribution company, or any

affiliates of the foregoing. In addition, describe any known conflicts of interest between offeror or an affiliate of offeror and any member of the EERMC.

- K. **Litigation.** Describe any litigation, disputes, claims or complaints, or events of default or other failure to satisfy contract obligations, or failure to deliver products, involving offeror or an affiliate of offer, and relating to providing services similar to the services being solicited by the EERMC.
 - L. **Investigation.** Confirm that offeror, and the directors, employees and agents of offeror and any affiliate of offeror are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by state or federal law in any jurisdiction involving conspiracy, collusion or other impropriety with respect to bidding on any contract.
- III. **Cost Proposal.** Offerors must separate their cost proposals from their technical proposals and submit cost proposals as a separate file. Please complete, execute, and submit a cost proposal using the cost proposal form template attached hereto. Offerors must complete both Task Sheets Page(s) and the All-Inclusive Price Page. Please note that the potential budget range available from the EERMC for the scope of work outlined in this solicitation is approximately \$20,000-\$25,000, although costs outside of this range will be considered.
- IV. **ISBE Proposal.** Offerors must separate their ISBE proposals from their technical proposals and submit ISBE proposals as a separate file. To be eligible for ISBE points, an offeror must complete, execute, and submit the ISBE form template attached hereto. Offerors must complete both the List of ISBE Page and the ISBE Participation Rate Page. Failure to submit an ISBE proposal will result in the offeror receiving 0 points in the ISBE scoring category. See RFP Sections 1.5, 1.6, 1.7, 3.6, 3.7, and 3.8 for additional information.

SECTION 5: PROJECT DESCRIPTION AND SCOPE OF WORK

- 5.1 **Summary:** The EERMC is soliciting proposals from qualified offerors to support the Council's responsibility of providing public education and outreach on energy topics in 2022. Specifically, the EERMC is seeking an entity to plan, coordinate, facilitate, and publicize a Public Forum and a public Energy Lecture Series. The selected offeror will be responsible for promoting the Public Forum and the Energy Lecture Series, in coordination with the Office of Energy Resources and the EERMC. The Council intends these events to be opportunities to promote public understanding and stakeholder dialogue around the complex, interdisciplinary issues related to energy efficiency and how they impact Rhode Islanders today.
- 5.2 **Background and Motivation.** The EERMC is a council authorized, created, and established pursuant to the laws of the State of Rhode Island ("State") to help oversee Rhode Island's energy efficiency programs. One of the

EERMC's statutory responsibilities is to "promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated."

To do this, the Council has historically organized annual in-person public forums and lectures on current energy efficiency topics.

Due to the risks and challenges posed by the ongoing COVID-19 pandemic and to increase the possibility of public participation, offerors should plan to conduct virtual and/or hybrid events wherever feasible (i.e., an in-person event located within Rhode Island coupled with virtual streaming/recording) and describe this approach in their proposal. Any in-person venues must be accessible by public transportation.

Descriptions and links to recordings of previous virtual energy lectures funded by the EERMC can be found here: <https://rieermc.ri.gov/energy-lecture-series/>. A video of the 2020 virtual Public Forum can be viewed here: <https://rieermc.ri.gov/eermc-annual-public-forum/>.

In 2019, public education events were held in-person. Agendas, presentations and pictures from 2019 lectures and forums can be viewed at the following links:

- <https://rieermc.ri.gov/meeting/a-public-forum-building-rhode-islands-workforce-with-energy-efficiency-programs/>
- <https://rieermc.ri.gov/meeting/plugged-into-energy-research-lecture-series-energy-efficiency-in-ri-equity-and-innovation/>
- <https://rieermc.ri.gov/meeting/plugged-into-energy-research-lecture-series-energy-efficiency-in-ri-equity-and-innovation-2/>

5.3 Scope of Work: The EERMC is seeking proposals to plan, coordinate, facilitate, and market a Public Forum and a public Energy Lecture Series.

The primary objective of this RFP is to deliver public education on current energy topics to Rhode Island residents and businesses. Energy topics must be directly related to energy efficiency, conservation, and/or demand response, but should be tailored to broad audiences. Panels should feature a diverse array of speakers in terms of race, gender, age, and professional roles, experience, and expertise. The Lecture Series must include a minimum of three (3) lectures. Every effort should be made to ensure all these events can happen in 2022, avoiding major holiday timeframes.

The selected offeror will be expected to work closely with the EERMC, the EERMC's consultant team and OER to select relevant topics and speakers for events. Monthly virtual EERMC education group meetings can be used to for event brainstorming and planning with EERMC and OER.

To be responsive to this solicitation, offerors should propose timelines with clear milestones and deliverables for planning and conducting one public forum and an energy lecture series (with a minimum of three lectures).

An offeror's workplan must describe who will be responsible for each deliverable/milestone, provide a proposed strawman agenda with possible themes/topics for each event, and describe the potential objectives for each event and outreach action. Lastly, reporting metrics to measure success for each event/outreach action must also be described and incorporated into any proposed workplan. A successful workplan will answer the following questions:

- A. Does the offeror have sufficient experience planning, promoting, and hosting similar public events (both in-person and virtually)?
- B. Can the offeror demonstrate the capacity to craft engaging event narratives through thoughtful, timely, and relevant themes, topics, speakers, and conversation prompts?
- C. Does the offeror team include creative talent available to design eye-catching marketing materials?
- D. How will the offeror collaborate with the EERMC and OER to create successful events in 2022?
- E. How will the offeror ensure robust attendance at these public education events?
- F. How will the offeror respond to possible COVID-19 restrictions that might impact event planning and execution?
- G. When would the offeror encourage the EERMC to schedule the public forum and lecture series during 2022?
- H. How will the offeror determine the primary objectives for events?
- I. How will the offeror track and report success for each event?

Preference will be given to offerors with experience planning similar events in Rhode Island under similar circumstances and hosting virtual, in-person, and hybrid events. Preference will also be given to offerors with established marketing channels such as relevant email listservs, social media platforms, or other existing networks that could benefit from the EERMC's education events. Ideally, the offeror would be able to demonstrate sufficient understanding of sustainable energy concepts and the general energy landscape in Rhode Island and at regional and national levels.

A selected offeror will be expected to provide a ~15-20 minute presentation at a public EERMC meeting near the end of 2022 (likely in December) on the outcomes of the public education events.

If an offeror identifies a need for additional tasks, the offeror may indicate such additions in the project proposal.

5.4 Required Deliverables

- Successful planning, coordination, facilitation, and marketing of a Public Forum and a public Energy Lecture

- Series (minimum of three (3) lectures) on timely energy topics featuring relevant experts
- Speaker identification, recruitment, and coordination for the Public Forum and Energy Lecture Series
 - Monthly updates either in writing or via monthly check-in meetings with the EERMC’s education group; Additional updates and check- in’s as needed or requested
 - Year-end public presentation to the EERMC on the outcomes of the public events and outreach efforts
 - Summary report on selected performance metrics for the events and outreach efforts
 - Monthly invoices, as appropriate

5.5 Expected Tasks and Timeline

MILESTONE	ANTICIPATED DATE
Proposal Award	June 2022
Selected Offer to Begin Work	July 2022
Interim Reports	Written updates presented during monthly EERMC education group meetings. Additional updates and check-in’s as needed or requested
Task 1: Plan, coordinate, facilitate & Market a Public Forum	July-Dec
Task 2: Plan, coordinate, facilitate & Market an Energy Lecture Series (minimum of 3 lectures)	July-Dec
Task 3: Final Report & Presentation	December 2022

RFP Cover Sheet

Offeror's Name:	
------------------------	--

RFP Information	
Title of RFP:	
RFP Number:	

Offeror Information	
Legal Name of Offeror:	
Type of Entity (i.e. corporation, partnership, sole proprietorship):	
Mailing Address of Primary Place of Business:	
Phone Number:	
Website:	

Contact Person for the Offeror	
Name:	
Title:	
Mailing Address:	
Phone Number:	
Email Address:	

Signature of Authorized Person

Date

Printed Name, Title

Cost Proposal - Task Sheets

Offeror's Name:	
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Task Sheets. Please add or delete rows for team members and add or delete task tables as needed.

Task 1:			
Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Additional expenses that are not included in hourly rate			
Description of Expense		Price	
Total Task Price:		\$ _____	

Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name:	
------------------------	--

One All-Inclusive Price. This number represents the sum of all total task prices and any other costs and expenses charged to EERMC.

All-Inclusive Price:	\$ _____
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Signature of Authorized Person

Date

Printed Name, Title

ISBE Proposal – List of ISBEs Page

Offeror's Name:	
------------------------	--

Please see Sections 1.5, 1.6, 1.7, 3.6, 3.7, and 3.8 of the RFP for additional information.

Is the offeror a State certified ISBE (MBE, WBE or Disability Business Enterprise):	YES <input type="radio"/>	NO <input type="radio"/>
	If YES, provide the total dollar amount representing work that will be done by the offeror: \$ _____	

Identification of ISBE Subcontractors (Please add rows as necessary)		
ISBE Subcontractor's Name	ISBE Mailing Address, Email Address, and Phone Number	The total dollar amount representing work that will be done by the ISBE Subcontractor
		\$ _____
		\$ _____
		\$ _____

ISBE Proposal – Participation Rate and Signature Page

Offeror's Name:	
------------------------	--

A. Total amount of dollars representing work that will be done by the ISBEs:	\$ _____
B. All-Inclusive Price Listed in the Cost Proposal:	\$ _____
ISBE Participation Rate (=A/B):	_____ %

Signature of Authorized Person

Date

Printed Name, Title

EXHIBIT B
PROPOSAL

A. Overview

Cooperative Extension (Extension) serves as the education and outreach arm of Rhode Island's land grant institution, the University of Rhode Island (URI). URI Extension has a one hundred year history of bringing science-based information to stakeholders to help them solve problems at the individual and community level, including protecting human and environmental health and shoring up the local economy. URI Extension's Energy Literacy Initiative (ELI) targets consumers, businesses, decision makers and advocates, and this opportunity through the RI Energy Efficiency and Resource Management Council (EERMC) to curate and deliver science-based energy efficiency-related content aligns squarely with our mission. We excel at designing, planning, and executing the content of and format for events, workshops and training sessions; we promote them through a robust communications and marketing strategy that ensures the highest levels of engagement by our target audiences. URI Extension is committed to working to ensure that the information we disseminate is relatable to and accessible by all Rhode Islanders, even those with burdens that may compete with their ability to educate themselves.

To date, members of the URI Extension ELI team have coordinated and hosted hundreds of in-person workshops, training sessions and educational events on behalf of URI Extension programs. In early 2020, when the pandemic forced us to fine tune our virtual event offerings to engage with stakeholders in a socially-distanced, but rich and engaging way, we developed a series of live webinars and posted recordings of them to our [URI Extension Youtube channel](#).

URI Extension has a history of collaborating with both the RI EERMC and the RI Office of Energy Resources (RIOER) through URI Extension's Energy Fellows Program, established in 2008. We also supported the EERMC's education and outreach initiatives under contract in 2019 and 2020, leveraging relationships with the RIOER and local, regional and national organizations to successfully market the EERMC public forums and the Plugged into Energy Research lecture series both years. We worked collaboratively with the EERMC Education Team to plan, market and execute each of those activities.

Concrete examples of the breadth and depth of URI Extension's communications and marketing strategy are accessible here, on our *Tools to Increase Engagement in Extension Programs* webpage (<https://web.uri.edu/coopext/staff-resources/>). This internally-focused website was created for use by all Extension programs to ensure the highest levels of engagement are achieved through marketing, communications, and consideration of justice, equity, diversity and inclusion in our programming. The considerations and approaches to engagement outlined on our staff resource page will guide us in promoting the EERMC's education and outreach events and media to all. An integral part of the conversation throughout this project period must center on not only the importance of ensuring accessibility to information, but how we make sure that actually happens. We will lean on the systems and tools available through the University of Rhode Island's Community Equity and Diversity Office and leverage our relationships with community development organizations (e.g. Comprehensive Community Action Program) and others to ensure equitable access to these events and educational

materials for Rhode Island's most vulnerable populations. The work plan that follows outlines URI Extension's approach for researching, planning, promoting and executing a public forum and three energy lectures.

B. Work Plan

Throughout the project(s) implementation, URI Extension will provide monthly updates to report on progress and request feedback during the EERMC's Education Team monthly calls. URI Extension will leverage our internal marketing, communications and graphic design teams to develop creative, eye-catching e-blast, webpage, social media marketing and flyer content to promote the events. We will coordinate with communications contacts at the RIOER, the EERMC and other partners within our network to share event details with target stakeholders.

Through our URI Extension Energy Literacy Initiative, our team has an established understanding of current sustainable energy concepts and the general energy landscape in RI. Through our URI Energy Fellows Program, we have a vast network of energy industry leaders who have served as mentors, and program alumni who now work in the sector themselves. The URI Extension team will bring this experience to a collaborative content creation process with the EERMC Education Team; we will conduct research to ensure that the themes for public education events are timely, relevant and likely to garner interest from a variety of targeted stakeholders and the general public.

Through our past experience curating events for the EERMC, we recognize the importance of researching a potential topic thoroughly, and bringing those with technical expertise into the conversation to guide the content creation process and make introductions to other related experts. This is an inherent part of our organizational structure -- we curate content based on research findings from technical experts at our institution and beyond, and facilitate conversations around that content to initiate change at the individual and community level -- and our strong suit.

To determine the primary objectives for each planned event, URI Extension will review recent publications of the American Council for an Energy Efficient Economy (ACEEE), US Department of Energy, the Buildings Performance Institute, the American Council on Renewable Energy and Northeast Energy Efficiency Partnerships (NEEP) to identify potential themes. We will work through these organizational networks and others at the regional and local level to identify a shortlist of topic experts and community leaders to interview for context and/or as participants for speaking programs. Regional and local networks will be accessed through New England Women in Energy and Environment, LinkedIn, New England state energy offices, academic institutions, and local energy organizations. Throughout the process, we will solicit guidance from the EERMC Education Team and RIOER staff, as appropriate, and provide regular monthly and milestone updates. A proposed timeline outlining specific project milestones is detailed beginning on page 5.

URI Extension has extensive experience planning, curating, marketing, hosting and evaluating educational efforts targeted to the general public and discrete stakeholder groups. We regularly deploy information and event notices through our large network of interdisciplinary experts in academia, the public sector and the business community. All

2022 PUBLIC EDUCATION EVENT PLANNING AND OUTREACH - TECHNICAL PROPOSAL
 Submitted to the RI EERMC on June 3, 2022

URI Extension events, trainings and workshops are marketed based on a comprehensive, codified publicity plan written and monitored in cooperation with the in-house Extension communications and marketing Team.

Publicity plans outline: a) event details, including date, time, venue, target audience, and technology needs; b) graphics for printed and web-based marketing materials and; c) a timeline for marketing and communications efforts. Publicity plan timelines include a schedule for release of web content updates, eblast newsletters, online calendar postings, press releases and media advisories, social media posts and paid advertisements. Publicity plans are an integral part of CoopExt’s engagement model, and are tailored to specific audiences identified by the program coordinators. A unique plan will be designed for the public forum and each event within the lecture series. The publicity plan we developed to guide promotion of the 2020 EERMC Public Forum can be found in Appendix A.

URI Extension has access to a number of large email databases through which iModules eblasts can be sent to promote events and other educational information. The URI Extension “Stargazer” email database has over 31,000 email addresses for individuals who have signed up to receive event, workshop and training program announcements, research updates and other relevant correspondence for all URI Extension programs. Additionally, the offeror maintains an energy literacy database with over 4,000 email addresses, including: a) attendees of past EERMC-sponsored public forums and lectures; b) URI Energy Fellows Program partners; and c) others who have signed up for Cooperative Extension emails and selected to receive communications specific to ‘energy literacy’. URI Extension also has access to University-wide email databases for students, faculty and staff (~5,000 email addresses), and a broader URI database with nearly 100,000 recipients. Our internal marketing, communications and graphic design team allow us to leverage these outlets effectively and efficiently to send out event invitations and educational communications. Additionally, URI Extension’s social media engagement stretches across Facebook, Instagram, LinkedIn and Youtube. Table 1 summarizes our suite of communications outlets explained above, and subscribers for each.

Table 1: URI Extension Communications and Marketing Channels

<i>Type</i>	<i>Name</i>	<i>Target Audience</i>	<i>2021 Metric</i>
Email database	URI Extension “Stargazer”	General public	~31,000 subscribers
Email database	Energy Literacy	General public, businesses, policymakers, NGOs	~4,100 subscribers
Email database	URI Community	URI faculty, staff, alumni, students	~100,000 subscribers
Facebook	URI Extension @uricoopext	General public	~8,100 followers
Instagram	URI Extension @uricoopext	General public	~1,800 followers
YouTube	URI Extension channel	General public	~60,000 views

2022 PUBLIC EDUCATION EVENT PLANNING AND OUTREACH - TECHNICAL PROPOSAL
 Submitted to the RI EERMC on June 3, 2022

Type	Name	Target Audience	2021 Metric
Youtube	Energy literacy playlist	General public, energy professionals, decision makers	~1,250 views
Webinar	Learn at Home series	General public	~8,000 live attendees

Traditionally, all URI Extension educational events, workshops and training sessions are held in-person to encourage engagement with the material and increase the efficacy of learning outcomes. In March 2020, however, in-person activities were prohibited by the University, forcing programs to be delivered via video conferencing technology. This restriction was a blessing in disguise, as it forced us to master the art of virtual program delivery. Our Youtube channel includes an energy literacy playlist where recorded webinars, including the 2021 URI Plugged into Energy Lecture Series, 2020 EERMC Public Forum and 2020 EERMC Lecture Series recordings, can be found. The reach of these webinars and others to date are detailed in Table 2.

Event Description / Title	Live Attendees	Youtube Views
“Here Comes the Sun: Incorporating Resident Preferences into Solar Siting Policy for RI” (2021 URI Plugged into Energy Research Lecture) - <i>Virtual</i>	66	120
“It Takes a Village: Advancing Solar Energy in RI” (2021 URI Plugged into Energy Research Lecture) - <i>Virtual</i>	98	133
2021 Energy Fellows Program: Culminating Presentations Summit - <i>Hybrid, In person & Virtual</i>	41 (5 virtual)	N/A
Earth & Energy Science for Youth (2021 Learn at Home Webinar) - <i>Virtual</i>	25	109
“COVID 19 Crossroads: Achieving Equitable Health Outcomes through Energy Efficiency” (2020 EERMC public forum) - <i>Virtual</i>	97	162
“Energy Efficiency, Human Health & COVID 19” (2020 EERMC Plugged into Energy Research lecture) - <i>Virtual</i>	52	110
“Energy Efficiency in Schools: Safer Buildings, Healthier Students” (2020 EERMC Plugged into Energy Research lecture) - <i>Virtual</i>	61	160
“Barriers in Energy Efficiency in Rental & Affordable Housing” (2020 EERMC Plugged into Energy Research lecture) - <i>Virtual</i>	144	117
“Property Value Impacts of Commercial Scale Solar Energy in RI & MA” (Learn at Home webinar) - <i>Virtual</i>	74	220

Table 2: URI Extension Energy Literacy Events		
<i>Event Description / Title</i>	<i>Live Attendees</i>	<i>Youtube Views</i>
“Valuing Siting Options for Commercial Scale Solar Energy in Rhode Island” (Learn at Home webinar) - <i>Virtual</i>	60	161
“Wires with Weezie: Demystifying New England’s Energy Infrastructure” (Learn at Home webinar) - <i>Virtual</i>	40	136
“The Future of New England’s Cleaner Energy System” (Learn at Home webinar) - <i>Virtual</i>	30	195

Per updated University guidelines released in March 2022, URI Extension is now able to host a variety of high quality in-person, virtual and blended event structures. Specific and relevant examples of URI Extension-curated educational events are detailed in Section E: Examples of Prior Work.

The URI Extension web portal at <http://uri.edu/coopext> is an additional tool designed as a landing page that connects to all programs and activities sponsored by Extension funding and/or targeting external stakeholders. The web portal is a respected resource for a variety of educational materials and event information and has proven to be a strong marketing tool, especially when announcements are included under the Events section at the bottom of the page.

All URI Extension events are executed according to a production plan, designed by the project coordinators and shared with all speakers, staff and students to ensure smooth delivery. A production plan will be implemented for the public forum and each lecture series event, an example of which can be found in Appendix B. URI Extension will work in cooperation with the EERMC web manager to promote 2022 outreach and education events and post links to virtual content once events are completed.

Proposed Scheduling: If all events are to be completed in 2022, we would encourage the EERMC to schedule the lecture series on three separate dates in late August and September, and the public forum in November, prior to the Thanksgiving holiday.

In order to meet this timeline, research and interviews for the lecture series will be completed by early August 2022. A publicity plan will be developed and marketing of the events will begin early July and run through the completion of the final lecture in September. Research and interviews for the public forum will begin in early August 2022 continuing through September. A publicity plan for the public forum will be developed in September and executed throughout October and early November. Each of these steps will be subject to input from the EERMC Education Team, and a final report and presentation to the EERMC will be planned for early December 2022. This plan is contingent upon execution of contracts by the end of June 2022.

June: Contracts executed by end of month.

July: Research and Interviews for lecture series and publicity plan for lecture series are created and initiated.

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August: First lecture of the series is held. The publicity plan for the lecture series continues to be executed. Research and interviews for the public forum begin.

September: Second and third lectures of the series are held. Research and interviews for the public forum continue. Creation and initiation of the publicity plan for the public forum occurs.

October: Evaluation of the lecture series is completed. Execution of the public forum publicity plan continues.

November: The public forum is held. Evaluation of the public forum is completed.

December: Final presentation given to the EERMC.

Proposed content: Potential themes and a ‘strawman’ agenda for the public forum is outlined in Table 3 below. The same is outlined for the lecture series in Table 4 below. Each are intended to illustrate our ability to brainstorm and build content frameworks for educational events. An example of this framework in final form can be found within the facilitator’s agenda developed for the 2021 Lecture Series in Appendix C.

Table 3: 2021 EERMC Public Forum strawman	
Audience	Energy industry professionals, business owners, workforce development professionals, public officials, decision makers, early adopters
Theme	<i>Energy Management on a Grander Scale: Combating Climate Change at the Corporate and Institutional Level</i>
Potential Topics	Science-based climate targets, strategic energy management initiatives, green business planning
Potential Speakers	Senator Sheldon Whitehouse (Welcome/Keynote), Industry representatives (e.g. Toray Plastics, Schneider Electric), ACEEE industrial energy analysts, Marsha Garcia, URI Office of Sustainability
Length	3 hours
Agenda	9:00 a.m. - Welcome & Introduction to the EERMC, Audience Poll 9:15 a.m. - Keynote with Q&A (45 minutes) 10:00 a.m. - Panel 1 Introductions and moderated Q&A (45 minutes) 10:45 a.m. - Networking Break (15 minutes) 11:00 a.m. - Panel 2 Introductions and moderated Q&A (45 minutes) 11:45 a.m. - Engaging with the EERMC / Closing remarks 12:00 p.m. - Networking (virtual)

Table 4: 2021 EERMC lecture series strawman	
Audience	General public
Theme	Electrification: What does it mean for me?

Table 4: 2021 EERMC lecture series strawman	
Potential Topics	#1: Reducing Energy Burden for Homeowners and Landlords: Energy Assessments, Demand Response Programs, Heat Pumps, Combi Boilers and more!
	#2: Increasing Demands on the Electric System: Lessons, Impacts and Insights from the 2021 Texas Blackout and an Update on the RI Power Sector Transformation
	#3: Electric Vehicles: An update on EV infrastructure in RI: Policy Initiatives, Costs and Consumer Rebates
Length	90 minutes
Agenda	6:30 p.m. - Welcome, Audience Poll, Relevant EERMC video(s) 6:40 p.m. - Moderator Comments 6:45 p.m. - Speaker 1 Lecture and Q&A 7:15 p.m. - Speaker 2 Lecture and Q&A 7:45 p.m. - Engaging with the EERMC / Closing remarks 8:00 p.m. - Networking (if in-person)

Tracking and Reporting: All URI CoopExt educational programs are designed to empower individuals with juried, science-based information to help them make more informed decisions. We track program engagement by recording the number of live attendees and Youtube views. In order to measure the effectiveness of our programs on behavior change, we design and administer pre- and post-tests to program attendees, and compare the data we receive to determine the percent change by individual before and after an educational event.

Using standardized evaluation questions in development for use by all URI Extension programs in Qualtrics, the offerors will survey program participants before and after EERMC’s events to determine their levels of awareness and knowledge around the topics we discuss, and also their willingness to change their behavior related to the topics discussed and calls to action we propose. We will also collect demographic data at the time of registration from program participants, via the standardized form question in Figure 1. If desired, we will also ask for zip code and professional affiliation. The results of this evaluation will be included in the final report to the EERMC.

Demographic Information: It is important that we ensure equal opportunity for all who might benefit from our programs. To help us improve how well we reach the diverse audiences within Rhode Island, and as a way to document those we are currently reaching, we are seeking the following information on an optional basis:

<p>Race (select one or more):</p> <input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other <input type="checkbox"/> Prefer not to respond	<p>Ethnicity:</p> <input type="checkbox"/> Hispanic or Latino <input type="checkbox"/> Not Hispanic or Latino <input type="checkbox"/> Prefer not to respond	<p>Gender:</p> <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> Other <input type="checkbox"/> Prefer not to respond
---	---	--

Figure 1: Collection of Demographic Data from Program Participants

Outreach During COVID-19: URI Extension has adapted to offer blended in-person and virtual learning opportunities during the COVID-19 crisis using Zoom events and meetings, WebEx events and meetings, and Panopto software, an all-inclusive recording and video conferencing solution specifically tailored for blended events. URI has venue space and access to information technology support across multiple campuses that may be leveraged for use. The ability to offer a blended event would allow flexibility in scheduling speakers and options for attendees in light of emerging COVID-19 restrictions and guidance.

COVID-19 restrictions will not impact event planning and execution, as the offerors are accustomed to planning and implementing high-quality educational programming virtually. However, URI Extension follows directives set by the College of the Environment and Life Sciences Dean's Office related to in-person programming, and at present, in-person events are allowed. If remote delivery of this programming is required due to policy, it should be noted that URI Extension has professional licenses for Zoom and WebEx for video conferencing and will utilize tools available through these platforms to conduct audience polls, and facilitate discussion through chat, Q&A and breakout rooms to ensure that participants feel engaged despite the remote nature of the programming.

C. Company Profile

The University of Rhode Island Cooperative Extension provides non-formal education and learning opportunities to both youth and adults throughout the United States — to farmers and families of rural communities as well as to people living in suburban and urban areas. Cooperative Extension programming emphasizes taking knowledge gained through research and education and sharing it to allow people to apply it to their everyday lives. All universities engage in research and teaching, but the nation's more than 100 land-grant colleges and universities have a third, critical mission — extension. The University of Rhode Island is one of these land-grant institutions, and through Cooperative Extension in RI, we bring vital, practical information to agricultural producers, small business owners, communities, consumers, families, and young people. We pride ourselves on our role in translating science for practical application, and are always looking to identify emerging research questions to which we find answers and encourage application of science and technology to improve agricultural, environmental, economic and social conditions. URI Extension was established in 1914, and employs approximately 40 faculty and staff members, 50 undergraduate and graduate students, and over 1,500 volunteers who work collectively to meet the organization's mission. We have the ability to connect with thousands of Rhode Islanders with the click of a button through our marketing and communication channels, and excel at formulating messages and repackaging concepts so that they are relatable to individuals across cultures, socioeconomic statuses, and communities.

D. Relevant Experience

The work outlined in this RFP is at the core of the URI Extension mission -- to disseminate juried, science-based information to stakeholders through in-person and virtual workshops, training, forums and events. We have a 100-plus year history of public engagement, and energy literacy is a strategic area of focus of our organization,

as detailed in our strategic plan, available at https://web.uri.edu/coopext/files/Coop_Extension_Strategic_Plan_2018.pdf. Curating events to engage energy professionals, decision makers, students and the general public has been an important mechanism to achieving this objective. As has been mentioned already, we coordinated and marketed the Plugged into Energy Research Lecture Series in person 2017-2019 and virtually in 2020, and the EERMC Public Forum in person in 2019 and virtually in 2020. Additionally, members of this offeror team have planned, marketed, hosted and evaluated over 50 virtual educational webinars since 2020, with an average of 150 participants per event.

E. Examples of Prior Work

URI Cooperative Extension has coordinated and implemented many public education programs, including events specific to energy literacy. Specific relevant examples of educational events Cooperative Extension has planned and executed include:

- 2019 EERMC public forum (in-person)
- 2020 EERMC public forum (virtual)
- 2015-2017, 2019 Plugged into Energy Research lecture series (in person)
- 2020 Plugged into Energy Research lecture series (virtual)
- 2020 Learn at Home webinars (virtual):
 - *Wires with Weezie - Demystifying New England's Energy Infrastructure*
 - *The Future of New England's Cleaner Energy System*
 - *Valuing Siting Options for Commercial-Scale Solar Energy in RI*
 - *Property Value Impacts of Commercial-Scale Solar Energy in RI and Massachusetts*
- 2021 Plugged into Energy Research lecture series (virtual)
 - Here Comes the Sun: Incorporating Resident Preferences into Solar Siting Policy for RI
 - It Takes a Village: Advancing Solar Energy in RI

More information about the Plugged into Energy Lecture Series and the recording for the 2021 events can be found at the following link: <https://web.uri.edu/coopext/plugged-into-energy-research-lecture-series/>

Recordings of other events, including the 2020 EERMC Public Forum and Learn at Home Webinars can be viewed on the URI Extension Youtube channel on the Energy Literacy playlist accessible via the following link: <https://www.youtube.com/playlist?list=PLXL0ba4UPZKLA7QVpNM3zoVTgCe8pF6GN>

Details about the marketing and production of events are included in Appendix A: 2020 EERMC Public Forum Publicity Plan and Appendix B: 2020 EERMC Public Forum Production Plan.

F. Reference Information

1. Dr. Simona Trandafir, Associate Professor, Undergraduate Program Director,

Environmental & Natural Resource Economics, University of Rhode Island,
Simona@uri.edu, 401-874-7428

2. Stephen Dolinich, Manager, Talent Acquisition, Thielsch Engineering,
SDolinich@thielsch.com, (401) 467-6454

G. Identification of Staff and Subcontractors

Staff members include [Kate Venturini Hardesty](#), Extension Program Administrator, [Kaylyn Keane](#), Energy Programs Manager, and Kurta Beyan, 2022 Extension Energy Literacy Fellow, all of URI Cooperative Extension.

H. Staff Responsibilities

Kate Venturini will provide in-kind support towards management of the communications and marketing strategy for the project, and overall project and staff management. Kaylyn Keane will be responsible for curation of educational content, scheduling and logistics for all in-person and virtual/blended events. Kurta Beyan, URI Cooperative Extension's 2022 Energy Literacy Fellow, will be responsible for background research and theme exploration, scheduling of interviews, execution of the publicity plan and logistical support.

I. Staff Experience

See Appendix D for Kate Venturini Hardesty's curriculum vitae, Kaylyn Keane's resume and Kurta Beyan's resume.

J. Conflicts of Interests

Signatory has no knowledge of any related conflicts of interest.

K. Litigation

Signatory has no knowledge of any related litigations.

L. Investigation

Signatory has no knowledge of any related investigations.

Appendix A: 2020 EERMC Publicity Plan

EVENT DETAILS

Date: Thursday, September 24, 2020
Time: 1:00-3:00 p.m
Location: [WebEx Event](#)
Max # Participants: 10,000
Target Audience: Individuals working in and around energy efficiency, health, workforce development in RI, legislators and policy makers, training program representatives
Registration: Required via WebEx
Registration Fee: \$0
WebEx links: [Participant link](#) ~ [Panelist link](#)

COVID-19 Crossroads: Achieving Equitable Health Outcomes through Energy Efficiency - A virtual event

Thursday, September 24th | 1:00-3:00 p.m.

The RI Energy Efficiency and Resource Management Council invites you to its 2020 public forum. Join us for a discussion with health and energy experts and community leader experts across the United States that will dive into the relationships between public health, equity and energy efficiency.

- DISCOVER how energy efficiency can help improve health outcomes and promote racial equity.
 - CONNECT with change makers in policy and business supporting innovation in the energy plus health space.
 - GET INVOLVED and participate in the public process that guides energy efficiency programming.
-

Speakers (see Agenda for headshots to place on flyer):

Anthony Hubbard, *Chief Executive Officer, YouthBuild Preparatory Academy, Providence, RI*

Reilly Loveland, *Project Manager, New Buildings Institute, Portland, OR*

Angela Ankoma, *Executive Vice President, United Way of Rhode Island, Providence, RI*

Kevin Kennedy, *Environmental Health Program Director, Children's Mercy Kansas City, Kansas City, MO*

Ellen Tohn, *Principal, Tohn Environmental Strategies, Boston, MA*

Ruth Ann Norton, *Chief Executive Officer, Green and Healthy Homes Initiative, Baltimore, MD*

Christopher Coll, *Program Manager, NY State Energy Research & Development Authority, Albany, NY*

Mark Kravatz, *Executive Director, Habitat for Humanity Rhode Island, Providence, RI*

Appendix A: 2020 EERMC Publicity Plan (cont'd)

MARKETING MATERIALS

- 1) Eblast to Stargazer listserv - Detailed Invitation
- 2) Flyer
- 3) Facebook Event

DEADLINES

Tuesday, 9/1: Ask Josh to reschedule eblast to Wed 9/9

Thursday, 9/3: Revise flyer with comments from Kaylyn [Juli]

Friday, 9/4: Send Final Event Flyer and Eblast content to EERMC Edu Group for review

Friday, 9/4: Send Event Flyer Announcement from CoopExt@uri.edu to [2019 EERMC Public Forum Publicity Contact List](#)

Friday, 9/4: Send Event Flyer & Info to Robert Beadle (robert.beadle@energy.ri.gov) for RI OER Newsletter feature & Nathan Cleveland (nathan.cleveland@energy.ri.gov) for Zero Energy Working Group

Wednesday, 9/9: [Create Facebook Event Listing](#): [Draft language for event listing \(Last years FB event\)](#)

Wednesday, 9/9: [Create URI EventsCalendar Listing](#): [Draft language for event listing \(Last year's URI Event listing\)](#)

Wednesday, 9/9: Update EERMC website with RI OER's graphic announcement and flyer

Friday, 9/11: Send Detailed Invitation eBlast through Josh Aruajo (with flyer attachment and link to registration to [CoopExt "Stargazer" distribution list](#), [2019 EERMC Public Forum Publicity Contact List](#), EERMC webmaster, all speakers, [2019 Public Forum attendees & 2020 VIP List](#))

Thursday, 9/10: Post on RI OER & URI CoopExt Facebook / Instagram

Thursday, 9/17: Send URI Media Advisory out through Todd McLeish

Tuesday, 9/22: Send Reminder eBlast through Josh Aruajo with link to registration to [CoopExt "Stargazer" distribution list](#)

Thursday, 9/24: "Today!" post on RI OER & URI CoopExt Facebook and Instagram

VIRTUAL PUBLIC FORUM

STATE OF RHODE ISLAND
ENERGY EFFICIENCY &
RESOURCE MANAGEMENT COUNCIL

**COVID-19 CROSSROADS:
Achieving Equitable Health Outcomes Through
Energy Efficiency**

THURSDAY, SEPTEMBER 24, 2020 | 1:00 - 3:00 P.M.

KEYNOTE: BUILDING HEALTH FOR ALL
Reilly Loveland | New Buildings Institute, Portland, OR
What does a successful future look like in the built environment if resources were used to invest in energy efficiency, equity and health in dispersed buildings? The New Buildings Institute will provide examples of a roadmap that can be utilized to strategically track progress in this area.

PANEL 1: THE INTERSECTIONALITY OF ENERGY, SOCIOECONOMIC STATUS, RACE & HEALTH

Yasmin Yacoby (Moderator)
RI Office of Energy Resources

Angela Ankoma
United Way of Rhode Island

Ellen Tohn
Tohn Environmental Strategies

Kevin Kennedy
Children's Mercy Kansas City

The COVID-19 pandemic shone a light on and exacerbated multiple social determinants of health in today's society, including race, wealth, education and physical environment. These inequities disproportionately harm Communities of Color and marginalized communities. This conversation will help to put into context the relationship between energy efficiency, wealth, race and health.

PANEL 2: OPPORTUNITIES FOR IMPROVEMENT: MODELS AND SOLUTIONS FOR THE FUTURE

Roberta Fagan (Moderator)
Energy Marketers Association

Ruth Ann Norton
Green and Healthy Homes Initiative

Christopher Coll
NY State Energy Research and Development Authority

Mark Kravatz
Habitat for Humanity Rhode Island

COVID-19 has highlighted the urgent need to address health inequities related to many socioeconomic factors, specifically physical environments. There are opportunities to address energy efficiency, health and workforce development goals through improvements to dispersed individual buildings. This conversation will explore barriers to energy efficiency investments in residential buildings and the role of community organizations in implementing efficiency programs and developing the workforce.

This virtual forum is free and open to the public. Registration is required - please register at bit.ly/eermcforum. Questions? Please contact Kate Venturini at kate@uri.edu.
We look forward to sharing this important work with you!

Appendix B: 2020 EERMC Public Forum Production Plan

Hosts:

Kate Venturini Welcome slide, general and targeted questions into the Q&A box
 Kaylyn Keane Mute panelists, reassign speakers as attendees after they speak

WebEx Audience Poll (Kate V.):

What is your primary role in the energy and/or health sector?

Advocate / Volunteer Energy professional Health professional
Homeowner / Landlord Policymaker Regulator
Renter Other

Schedule	Panelist	Role	Slides
1:05 - 1:09	Anthony Hubbard	Welcome Speaker	1-4
1:10 - 1:25	Reilly Loveland	Keynote Speaker	5-33
1:25 - 1:30	Yasmin Yacoby	Panel 1 Moderator Welcome	34
1:30 - 1:35	Angela Ankoma	Panel 1 Speaker 1	none
1:35 - 1:40	Ellen Tohn	Panel 1, Speaker 2	35-37
1:40 - 1:45	Kevin Kennedy	Panel 1, Speaker 3	38-40
1:45 - 2:05	Yasmin, AA, ET, KK	Panel 1 Moderated Discussion	41
2:05 - 2:10	Roberta Fagan	Panel 2 Moderator Welcome	42
2:10 - 2:15	Mark Kravatz	Panel 2 Speaker 1	43-45
2:15 - 2:20	Chris Coll	Panel 2 Speaker 2	46-48
2:20 - 2:25	Ruth Ann Norton	Panel 2 Speaker 3	49-51
2:25 - 2:45	Roberta, MK, CC, RN	Panel 2 Moderated Discussion	52
2:45 - 2:50	Karen Verrengia	Call to Action Speaker	53-54
2:50 - 3:00	Kate Venturini	Closing Remarks	55

Notes for all:

- ★ Enter webinar [using panelist link](#)
- ★ After you speak, the hosts will re-assign you to an attendee. This will take away your ability to unmute yourself or show your video, but it will also minimize audio and bandwidth issues. If you want/need to speak, please text Kaylyn at **xxx-xxxx**
- ★ The Q&A box will be enabled for attendees to ask questions.
- ★ During Anthony, Reilly and Karen’s sessions, Kate will relay any questions from the Q&A to the current speaker.
- ★ During the two panels, Yasmin and Roberta will pull from those and prepared questions they have during the panel discussion following each presentation.

Panelist Notes:

- ★ Five minute presentation each with 1-2 slides on [Google Slides template](#)
- ★ You will have the ability to unmute yourself and show your video while a panelist. The moderator will direct each speaker when they should speak, to avoid overtalk. Please only unmute when directed by the moderator. Hold down the spacebar to talk when you’d like to chime in. Please note that the hosts will mute you if there is over talk, or if you don’t mute yourself when your section is live.

Appendix B: 2020 EERMC Public Forum Production Plan (cont'd)

Moderator Responsibilities:

- ★ Give a brief introduction of the panel, introduce panelists, please see this [detailed agenda](#) for introduction notes.
 - ★ Mention that each panelist has 5 minutes to speak, and then we will go to questions (NOTE: Host will share screen and progress slideshow at the direction of panelist)
 - ★ Put up hand at 5 minutes for each speaker
 - ★ Pipe in at 6.5 minutes if they're not done to begin transition to next speaker
 - ★ After each panelist has given their remarks, pull from prepared questions and direct each question initially to a specific panelist
-AND/OR-
 - ★ Select questions from Q&A box; direct to a specific panelist, or articulate who should answer first, second, third
-

Moderator Questions:

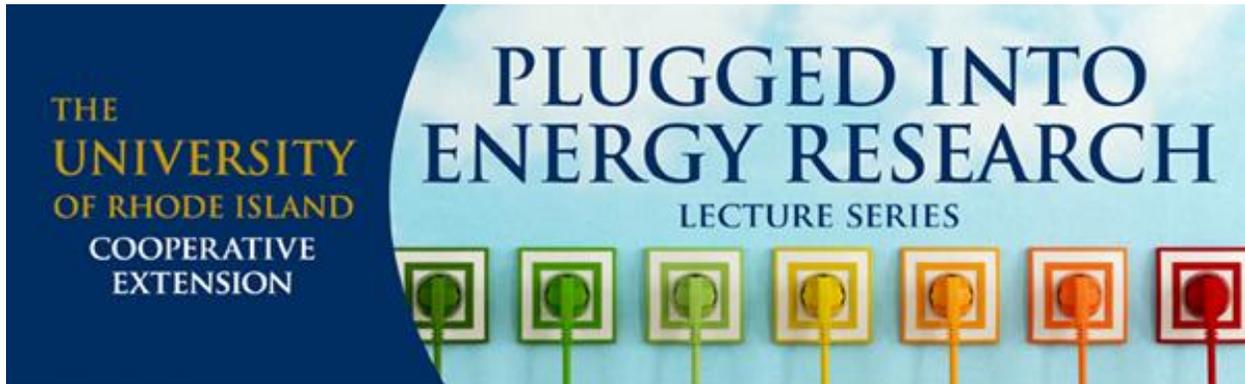
Yasmin / Panel 1 questions for all:

1. How has the COVID-19 pandemic impacted your work in this space?
2. What, in your opinion, is the number one action we should take to ensure that socioeconomic status and race **do not** negatively impact individual and community health?
3. Communities with high energy burdens are often low income and communities of color. How can energy efficiency programs distribute equitable costs and provide equitable benefits to these communities where they have the greatest impact?

Roberta / Panel 2 questions for all:

1. How might we scale up some of the examples of your work you shared today to increase the impact of pilot programs?
2. Are there community organizations that could play a more active role in the energy efficiency environment/sector/industry if they were asked?
3. What would an ideal energy plus health workforce look like, and how do we build it?

Appendix C: 2021 Lecture Series Agenda



Solar Solutions: Reaching Renewable Energy Goals in Rhode Island

Before Rhode Island can meet ambitious climate goals outlined in the *2021 Act on Climate* (S-0078A, H-5445A) and Governor Gina Raimondo's Executive Order 20-01, *Advancing a 100% Renewable Energy Future for Rhode Island by 2030*, there are a number of challenging obstacles to overcome.

How can we reach renewable energy targets while maintaining a vibrant economy and protecting our natural environment? In what ways will emerging technology shape the efficiency, security and reliability of our electric grid? How will policy-related decisions impact the future of our state?

The sixth annual [Plugged into Energy Research lecture series](#), hosted by URI Cooperative Extension, will focus on these and other concerns in discussions centered on the 2021 lecture series theme, *Solar Solutions: Reaching Renewable Energy Goals in Rhode Island*. Join us on Zoom on October 27 and November 17 for lively panel discussions featuring state policymakers, research faculty, energy and climate advocates, URI Energy Fellows and others working to create a more resilient energy economy in Rhode Island.

[Register for Lecture 1 here.](#) [Register for Lecture 2 here.](#)

Appendix C: 2021 Lecture Series Agenda (cont'd)

Lecture 1:

It Takes a Village: Advancing Solar Energy in RI
Wednesday, November 3, 2021 at 6:00 p.m

Solar energy is proving to be an integral part of the future of the New England power system. Rhode Island has mandated lofty renewable energy goals for the electric sector and an increased reliance on solar energy will be a key factor in reaching those goals. How can we reach these important targets while maintaining a vibrant economy and conserving the natural environment in our state? Hear perspectives and considerations from our panelists in public administration, academic research and non-profit advocacy.



SPEAKERS:

Carrie Gill, PhD

Administrator

Grid Modernization and Systems Integration

Rhode Island Office of Energy Resources

The 2021 Act on Climate requires Rhode Island to reach net zero greenhouse gas emissions by 2050. One essential pathway is through meeting all of our electricity needs with renewable energy resources. How much new renewable energy do we need? What are some tradeoffs between different types of renewable technologies? What are some actions we should take?



Corey Lang, PhD

Associate Professor

Environmental and Natural Resource Economics

University of Rhode Island

Understanding and estimating resident preferences about where to site solar energy can inform policy around this complex issue in Rhode Island. With this information in hand, how can development incentives be structured to keep residents content, community character intact, and renewable energy targets met?



Priscilla De La Cruz

Senior Director

Government Affairs

Audubon Society of RI

Renewable energy is an important component of Rhode Island's sustainable economy. What are the key environmental considerations we must examine as we navigate the path towards reliance on land-based renewable energy technology?

Appendix C: 2021 Lecture Series Agenda (cont'd)

Lecture 2

Renewable Energy and our Electric Grid: Innovation at URI

Wednesday, November 17th, 2021 @ 6:00 p.m

Renewable energy will be an integral part of New England's future power system. Rhode Island has mandated aggressive renewable energy goals for the electric sector, which will increase our reliance on the electric grid and demand innovation in the space. Research into technological innovations to improve the efficiency, security and reliability of our electric grid are underway right here at URI. Hear about this exciting research in the second lecture of the [2021 PIER Lecture Series](#) on Wednesday, November 17th at 6:00 p.m. on Zoom! [Register for Lecture 2 here.](#)

Introduction & Welcome:

Mary Werner, *Solar Technologies Program Manager*, NREL, Golden, CO



Speakers:



Hui Lin, PhD

Assistant Professor, Electrical, Computer & Biomedical Engineering, University of Rhode Island

Dr. Lin's primary research interests include cybersecurity, intrusion detection systems, and software-defined networking (SDN) in the areas of cyber-physical systems, such as power systems.

The electrical power grid is one of the most essential infrastructures in modern society. Dr. Lin will present his research on pre-empting damage from cyber attacks on the next generation of power grids known as the "smart grid".



Brett Lucht, PhD

Professor, Department of Chemistry, University of Rhode Island

Dr. Lucht's primary research interest focuses on the investigation of non-aqueous electrolytes for lithium ion batteries for electric vehicles. Much of this research is focused on understanding the performance limiting reactions of the electrolyte with the surface of the electrode materials which limit the life and energy density.

URI's world renowned expert on lithium ion batteries will present his research on the battery performance and renewable energy storage and electric vehicles.



Jesse Duroha

PhD Student, Industrial & Systems Engineering, University of Rhode Island

Jesse C. Duroha is a Ph.D. student in Industrial & Systems Engineering at The University of Rhode Island in the Sustainable Innovative Solutions (SIS) Lab and a 2021 URI Energy Fellow. His research explores the impact of ergonomics in the solar industry, in order to sustain its growth through a healthy and sustainable workforce.

Exponential growth in the solar energy industry is anticipated over the next 10 years. Jesse will share his research on identifying and correcting operational inefficiencies of solar energy systems.

Appendix D: Staff Experience

Kurta Beyan

403 West Ave, Pawtucket, RI 02860, 401-543-8883, Kurta_beyan@uri.edu

Profile: Environmental and Natural Resources Economics major with working knowledge of energy efficiency and environmental sustainability studies. Motivated student aiming to leverage my knowledge in resolving environmental and energy issues.

Skills

- Knowledge of Microsoft Office Suite
- Flexibility and adaptability
- Work with iCentrix, Okta and GMetrix
- Attention to detail

Education

- Bachelor of Science, Department of Environmental and Natural Resource Economics, University of Rhode Island, December 2022.
- Associate of General Studies, Community College of Rhode Island, 2020.

Awards

- High Honors: Community College of Rhode Island | Class of 2020.
- Dean's list: University of Rhode Island | Spring 2021.
- Outstanding Academic Achievement: Office of the Speaker, Rhode Island House of Representatives | 2020.
- Eta Sigma Chapter of Phi Sigma Pi National Honor Society | 2021.

Related Coursework

- EEC 350G: Sustainable Energy Economic and Policy.
- EEC 352G: Economic of Small-Scale Energy System.
- EEC 345G: Sustainable Development and Environment
- SUS 306: Sustainability and Service Leadership.

Experience:

- Awake Overnight Direct Support staff | Advocates Inc. November 2017-present.
Duties included:
 - Completing daily and monthly individual's progress notes.
 - Schedule and follow up with individual doctor's appointments.
 - Balance daily and monthly financial transactions
 - Create individual monthly newsletters.

Appendix D: Staff Experience (cont'd)

KAYLYN C. KEANE

56 Angel Rd, Chepachet, RI 02814 • 401-862-3192 • Kaylyn.Hawkes@gmail.com

Relevant Skills & Experience

Program Coordinator, University of Rhode Island, Kingston, RI | 2015-Current

Overview: This role includes coordination and management of the URI Energy Fellows Program (EFP), a premier experiential program for URI students and energy literacy programming through URI Cooperative Extension. Duties include recruiting, hiring and training of students, relationship management, event content curation and writing.

Key Skills: Interpersonal skills, ability to effectively communicate with student groups and industry partners, grant writing, working knowledge of energy systems & policy, relationship building, marketing, event coordination.

Founder & CEO, Keane's Wood-Fired Catering LLC, Cranston, RI | 2015-Current

Overview: Keane's Wood-Fired Catering is a boutique catering company specializing in weddings, corporate catering and special events. The company has grown by 25% annually since 2018 and is projected to reach 1M in revenue in 2022.

Key Skills: Interpersonal relations, business management, organization & logistics, marketing strategy, executive leadership, Quickbooks

Program Manager, Cultivating Community, Melbourne, Australia | 2013 - 2015

United Nations of Australia 2015 World Environment Day Award Winning Program

Overview: Coordination of a community food waste & composting program for local businesses. Duties included overseeing composting operations, planning community education events, fundraising and managing volunteers.

Key Skills: Interpersonal relations, client relationship building and management, team leadership & management, organization, writing, program evaluation.

Grant Administrator, Collier Charitable Fund: Melbourne, Australia | 2013 - 2015

Overview: Administration of a multi-million dollar philanthropic organization.

Key Skills: Time management, written communication, organization, interpersonal skills, database management.

Education & Certifications

Master of Science in Ecological Economics, University of Edinburgh, UK, 2012

Bachelor of Science in Environmental Science, University of Vermont, US, 2010

Voluntary & Community Involvement

Coordinator, Open-Table, Melbourne Australia, 2013-2015

Coordinated and facilitated community meals with volunteers and surplus produce.

Facilitator, Welcome Dinner Project, Melbourne Australia, 2013-2015

Facilitated home dinners with established Australians to 'welcome' refugees and international students.

Volunteer Gardener, CERES Park, Melbourne Australia, 2012-2014

Appendix D: Staff Experience (cont'd)

KATE ELIZABETH VENTURINI

43 Dayna Drive, West Greenwich, RI 02817 | 401-874-2900 | kate@uri.edu

EDUCATION

Master of Arts in Marine Affairs, University of Rhode Island, 2010

Thesis: *Bottom-up Policy Implementation through Science-based Education Programs*

Bachelor of Landscape Architecture, University of Rhode Island, 2006

PROFESSIONAL EXPERIENCE

Outreach Programs Administrator, URI Cooperative Extension, 2016-present

In addition to the leadership I provide to the Mallon Outreach Center described in the Interim Director section below, I've developed, implemented and currently manage a number of URI Cooperative Extension programs and initiatives in my capacity as an outreach programs administrator for URI Extension, including:

- *RI Agriculture and Food Systems Fellows Program* - wrote a grant and was awarded \$750,000 from the US Department of Agriculture National Institute of Food and Agriculture to fund forty fellowships for undergraduate students interested in food system careers at URI and the Community College of Rhode Island. The program is modeled after the URI Energy Fellows Program and incorporates leadership and professional development skill-building, experiential learning alongside industry and academic mentors, a hands-on youth-led educational practicum, inclusive science communication training, and industry training from educational partners across the food system sector in New England for each student participants.
- *Communications and Marketing Initiative* - an effort to strategize and coordinate management of legacy and new media for all Extension programs to increase public engagement. This includes production of videos, television segments and radio segments, development of an editorial calendar for social media platform posts, email marketing campaigns and the Extension web portal. The team liaisons with the broader URI communications experts and local media to ensure that Extension programs are well represented in marketing efforts.
- *Energy Literacy Initiative* - began with a planning process to identify opportunities to build capacity for URI's role in preparing the next generation of clean energy workforce professionals through the URI Energy Fellows Program, and provide energy education to Rhode Islanders to forward goals set by the RI Office of Energy Resources and other key energy stakeholders. The initiative has led to contracted work with the RI Energy Efficiency and Resource Management Council and URI faculty involved in energy-related research projects.

Appendix D : Staff Experience (cont'd)

- *Extension Justice, Equity, Diversity and Inclusion Initiative* - beginning in 2020, mobilized the Cooperative Extension and Outreach Coordinating Committee to refocus our strategic efforts on accessibility to and relevance of all interdisciplinary Extension programs for all Rhode Islanders, beginning with a campaign to collect consistent demographic and program evaluation data, followed by community-based needs assessments, resource portal development for faculty, staff, students and volunteers, and program design and marketing based on the results of the exercise.
- *Home Horticulture Certificate Program (HHC)* - established a new education program in an effort to build on the successful structure of the URI Master Gardener Program core training curriculum. HHC allows us to maximize our strengths in training practitioners and others interested in science-based horticultural education without requiring volunteer service associated with the URIMGP.
- *URI School Garden Initiative (SGI)* - began as a pilot program with the Providence Public School District, and sought to establish unique learning environments in elementary, middle and high schools in Providence to enhance Science, Technology, Engineering, Arts and Mathematics (STEAM) proficiency through blended learning in classroom and field settings. The partnership supported teachers through professional development to improve their perceived self-efficacy around teaching horticultural and agricultural topics to students. Over 20 PPSD schools are still engaged in the initiative with gardens and teams on the ground. The Initiative has expanded statewide, with nearly 75 schools participating as members of the URI CoopExt School Garden Initiative.

Interim Director

Outreach Center, University of Rhode Island, Kingston

2013-2016

This leadership position, with a team of seven full- and part-time employees, including Ph.D. and Master's degree social scientists, Bachelor's degree horticultural specialists, administrative support staff, and between five and ten undergraduate and graduate students in fellowship and internship positions, required administrative prowess and high levels of organization. Our team's work centered on the assumption that the attainment of knowledge leads to heightened awareness, which can inspire behavior change and improve social, economic and/or environmental conditions. The issues we worked to impact include ecosystem function in urban and suburban areas, water quality and wildlife habitat protection, food security and our local food system, renewable energy technologies, home energy efficiency and transportation policy development and Science, Technology, Engineering, Arts and Mathematics (STEAM) proficiency in K-12 youth. I worked with staff, students and our stakeholders to identify challenges related to the issues we work around through needs assessments, then designed programs that synthesized research findings into outreach messages to inspire action. In my tenure as Interim Director, I trained staff and students in program design and evaluation using logic models, priority setting, workplace professionalism, and oral and written communications. I eliminated inefficiencies in our program portfolio,

Appendix D: Staff Experience (cont'd)

formalized a robust and efficient experiential learning structure for our student fellowship positions, worked with individual staff to develop annual work plans to guide their programmatic work and secured grants and contracts to support efforts outside the scope of Smith-Lever formula funded Cooperative Extension activities. I developed student positions for marketing, website management, administrative assistance, and public relations, conducted staffing analyses, contributed to state and federal reporting efforts, hired new employees and contractors and managed the Center's operating budget with administrative support staff.

Master Gardener Program Co-State Program Leader 2012
Outreach Center, University of Rhode Island, Kingston

I was appointed to serve as University staff representative to the URI Master Gardener Association (MGA) Board of Directors following the reassignment of a colleague who had served in the position for over 20 years. I helped to review roles and responsibilities of URI staff vis a vis the Master Gardener Program (MGP) mission, which led to a multi-year reorganization of the MGP. I facilitated partnership-building with University and external partners to promote the MGP mission and extend resources into the community. I coordinated with regional and national Master Gardener volunteer management and outreach programs through conferences and eXtension to inform MGP policies and procedures at URI. I assisted in an annual review of MG Core Training curriculum and publications, updating them as needed to reflect suggested revisions by URI faculty and staff. Outside of administrative duties related to the MGP, I developed the Roger Williams Park Community Garden's construction and governance structure to include areas for Eco-Exploration Camp living laboratories and the Master Gardener-led Produce Donation Program, which now supplies nearly a ton of fresh produce to food pantries in Providence annually. I also led a design charrette that led to the establishment of an Edible Forest Garden in the Park. I managed these gardens through 2013 for the Providence Parks Department through an outreach contract. Following the establishment of the RI Residential Rain Garden Training in 2011, I continued to administer bi-annual training sessions for professionals and volunteers throughout RI. This was followed by the development of the Rain Garden Steward Program to assure that demonstration rain gardens installed through the RIRRG training program were maintained by trained MG volunteers who earned the "Water Quality Specialist" distinction.

Program Assistant 2011-2012
Department of Natural Resource Sciences, University of Rhode Island, Kingston

I managed the development of the RI Residential Rain Garden Training Program curriculum and training agenda, and delivered the pilot training session through the Nonpoint Education for Municipal Officials (NEMO) Program in Providence. I also assisted the NEMO Director in compiling RI Stormwater Design and Installation Standards Manual Training evaluations for monthly progress and final reports to state regulatory agency partners.

Appendix D: Staff Experience (cont'd)

GreenShare Program Manager 2006-2012

Outreach Center, University of Rhode Island, Kingston

During my tenure as the GreenShare Program Manager, I worked with Coastal Resources Management Council (CRMC) policy analysts to develop revisions to the Greenwich Bay Special Area Management Plan and the RI Coastal Plant Guide, delivering trainings to professionals about the new regulatory guidance and resources. I developed the RI Invasive Plant Management Training Program (IPTP) to certify green industry professionals working in coastal buffer zones as “Certified Invasive Managers” for CRMC, and began administering the program in 2008. I developed and delivered a MG Specialist training on native and invasive vegetation, and began teaching multiple sessions of the URI Master Gardener Core Training in 2010. I also began delivering regular educational workshops throughout New England on native landscape design, residential stormwater management, best landscape cultural practices for resource conservation and invasive plant management during this time. I also began administering the RI Residential Rain Garden Training in 2011, training professionals and volunteers in siting, design, installation and maintenance of rain gardens. I supervised and guided undergraduate Coastal Fellow horticulture interns as program assistants beginning in 2008.

URI Master Gardener Fellow 2005 – 2006

Cooperative Extension Education Center, University of Rhode Island, Kingston

My position was intended to serve the needs of the Cooperative Extension Education Center (CEEC), the Master Gardener Association (MGA) and the newly-formed Master Gardener Foundation (MGF) of RI. During this first year at the CEEC, I assisted with the development of fundraising materials and the first annual MGF Gala, and conducted a needs assessment to determine the public value of a new comprehensive waste reduction education and outreach program (now the URI Master Composter Program) for the CEEC. I served as the Planning Committee Chair and Event Manager for URI’s GreenShare Field Day [2005, 2006 and 2007] and the East Farm Open House and Crabapple Festival [2005, 2006 and 2007], working alongside MG volunteers and green-related industry professionals.

RELATED EXPERIENCE

Journalist’s Assistant 2003 – 2005

Mr. Jason Pisano

I provided personal care for Mr. Pisano and assisted him with research and writing for freelance journalism assignments for the Coventry Courier and Providence Journal.

Field Manager 2002-2003

RI Sierra Club / RI Public Interest Research Group

I was responsible for the management of a field canvass crew (5-10/daily), maintenance of a weekly fundraising quota (~\$5,000-10,000), and training of existing and incoming canvassers to effectively deliver various social and environmental campaign messages.

Appendix D: Staff Experience (cont'd)

HONORS AND ACTIVITIES

Recipient, Outreach Excellence Award

College of the Environment and Life Sciences, University of Rhode Island, 2013

Guest Contributor, Episode 321: Coastal Landscape Design, This Old House

PBS, Barrington, RI, 2012

Garden Time Education Program, Topics: Site Assessment, Backyard Wildlife Habitat

RI Department of Corrections, Cranston, RI, 2011–present

GroundCorp Training Program, Topics: Stormwater 101, Site Assessment, Native Plants

Groundwork Providence, Providence, RI, 2010-present

Plenary Speaker:

- National Extension Master Gardener Coordinator Conference, Pray, MT, 2016
- Joint Council of Extension Professionals Conference, Las Vegas, NV, 2015
- Ecological Landscaping Association Conference, Springfield, MA, 2011-2013
- RI Power of Place Summit, Providence, RI, 2010
- Land and Water Summit, Kingston, RI, 2010

Guest Producer and Contributor

WJAR NBC10 “Plant Pro” television segments, 2009-2019

Selected Project

Biological Oceanography experiment: “The Effects of Weightlessness on North 2003 American Crayfish and Copepods”, Reduced Gravity Student Flight Opportunities Program, National Aeronautics and Space Administration (NASA), Johnson Space Center, Houston, Texas.

PUBLICATIONS

Rice, Michael A., Sarina R. Rodrigues and Kate Venturini. “Philosophical & Institutional Innovations of Kenyon Leech Butterfield and the Rhode Island Contributions to the Development of Land Grant and Sea Grant Extension.” IN: Proceedings of Smith-Lever Centennial Symposium, Morgantown, WV, September 2014. 20p.

Leeson, Hope, Graham Gardner, Vanessa Venturini and Kate Venturini. “RI Native Plant Guide” (website). University of Rhode Island Outreach Center, Kingston, RI. 2014. Accessible at <http://web.uri.edu/rinativeplants/>

Venturini, Kate and Caitlin Chaffee. “Native Plant Site Solutions for Backyard Landscapes”, Rhode Island Cooperative Extension, University of Rhode Island, 2012.

Gordon, Dr. Susan, Caitlin Chaffee, David Hughes, Gabrielle Torphy and Kate Venturini. “RI Coastal Plant Guide”. University of Rhode Island Outreach Center. 2007. Accessible at cels.uri.edu/testsite/coastalPlants/CoastalPlantGuide.htm

Appendix D: Staff Experience (cont'd)

Venturini, Kate, K.M. Jager, and K.J. Savasta. "Preliminary Analysis of Pit Craters on Alba Patera, Mars Using MOC Data". Lunar and Planetary Science Conference, Houston, Texas, March 2003.

AFFILIATIONS

National Association of Extension Program and Staff Development Professionals,
2016-present

Professional Staff Association, 2011-present

Ecological Landscape Alliance, 2009-present

SERVICE

Trustee, Board of Trustees

West Greenwich Land Trust, West Greenwich, RI, 2021-present

Chair, Cooperative Extension and Outreach Coordinating Committee

University of Rhode Island, 2020-present

Member, URI Master Gardener Program Leadership Council

University of Rhode Island, 2016-present

Member, Cooperative Extension and Outreach Coordinating Committee

University of Rhode Island, 2014-2019

Member, Board of Directors

Master Gardener Foundation of RI, Kingston, RI, 2013-2018

Member, Board of Directors

URI Master Gardener Association, Kingston, RI, 2012- 2015

Member, Certification Committee

RI Nursery and Landscape Association, Kingston, RI, 2011

Member, Board of Directors

Ecological Landscape Association, Framingham, MA, 2010-2013

ISBE Proposal – List of ISBEs Page

Offeror's Name:	University of Rhode Island Cooperative Extension
------------------------	--

Is the offeror a State certified ISBE (MBE, WBE or Disability Business Enterprise):	NO
	If YES, provide the total dollar amount representing work that will be done by the offeror: \$ _____

Identification of ISBE Subcontractors (Please add rows as necessary)		
ISBE Subcontractor's Name	ISBE Mailing Address, Email Address, and Phone Number	The total dollar amount representing work that will be done by the ISBE Subcontractor
		\$ _____
		\$ _____
		\$ _____

ISBE Proposal – Participation Rate and Signature Page

Offeror's Name:	University of Rhode Island Cooperative Extension
------------------------	--

A. Total amount of dollars representing work that will be done by the ISBEs:	\$0
B. All-Inclusive Price Listed in the Cost Proposal:	\$25,024.14
ISBE Participation Rate (=A/B):	0%

 Signature of Authorized Person Date

 Theodore Myatt, Associate VP for Research Administration
 Printed Name, Title

Cost Proposal - Task Sheets

Offeror's Name:	University of Rhode Island Cooperative Extension
------------------------	--

Task 1: Plan, coordinate, facilitate and market a half-day Public Forum

Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate (salary + fringe)	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Kate Venturini Hardesty	\$67.25	6	\$403.50
Kaylyn Keane	\$47.51	126	\$5,986.26
Additional expenses that are not included in hourly rate:			
Description of Expense			Price
Catering			\$1,250.00
Social media advertising			\$250.00
Direct Costs Subtotal:			\$7,889.76
Indirect Costs			
Administrative F&A (state agency rate: 25% * direct costs)			\$1,972.44
Total Task Price:			\$9,862.20

Task 2: Plan, coordinate, facilitate and market an Energy Lecture Series

Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate (salary + fringe)	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Kate Venturini Hardesty	\$67.25	10	\$672.50
Kaylyn Keane	\$47.51	180	\$8,551.80
Additional expenses that are not included in hourly rate:			
Description of Expense			Price
Catering			\$1,800.00
Social media advertising			\$300.00
Subtotal Direct Costs			\$11,324.30
Indirect Costs			
Administrative F&A (state agency rate: 25% * direct costs)			\$2,831.08
Total Task Price:			\$14,155.38

Task 3: Prepare and Present Final Report			
Labor Costs			
Subcontractor or Team Member Name and/or Job Title	Hourly Rate (salary + fringe)	Estimated Hours	Evaluated Price (Hourly Rate * Estimated Hours)
Kate Venturini	\$67.25	2.27	\$152.66
Kaylyn Keane	\$47.51	13.73	\$652.51
Additional expenses that are not included in hourly rate:			
Description of Expense			Price
Subtotal Direct Costs			\$805.17
Indirect Costs			
Administrative F&A (state agency rate: 25% * direct costs)			\$201.29
Total Task Price:			\$1,006.46

Cost Proposal - All-Inclusive Price and Signature Page

Offeror's Name:	University of Rhode Island Cooperative Extension
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One All-Inclusive Price. This number represents the sum of all total task prices and any other costs and expenses charged to EERMC.

All-Inclusive Price:	\$25,024.14
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Signature of Authorized Person Date
Theodore Myatt, Associate Vice President for Research Administration
 Printed Name / Title

EXHIBIT C

REVISED SCHEDULE

**EXHIBIT C
REVISED SCHEDULE**

Month 1: Contracts executed by end of month.

Month 2: Research and interviews for lecture series and publicity plan for lecture series are created and initiated.

Month 3: First lecture of the series is held. The publicity plan for the lecture series continues to be executed. Research and interviews for the public forum begin.

Month 4: Second and third lectures of the series are held. Research and interviews for the public forum continue. Creation and initiation of the publicity plan for the public forum occurs.

Month 5: Evaluation of the lecture series is completed. Execution of the public forum publicity plan continues.

Month 6: The public forum is held. Evaluation of the public forum is completed.

Month 7: Final presentation given to the EERMC.

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7
Contracts executed							
Research and interviews for lecture series and publicity plan							
Implement publicity plan							
First lecture series held							
Second and third lectures held							
Lecture series evaluation							
Public forum held							
Summary presentation to EERMC							