



Terms of Reference and Scope of Services

Discourse Developer

Short-term Consultancy

Background: Caribbean countries rely heavily on diesel-generated electricity. As a result, they experience some of the highest electricity prices in the world and their economies are highly vulnerable to global oil price fluctuations. In turn, their reliance on fossil fuels presents a significant barrier to sound socio-economic development pathways for countries in the region. Therefore, by reducing their dependency on imported fossil fuels through the generation of renewable energy, Caribbean countries will be more resilient, less vulnerable to price shocks, and will keep a greater proportion of gross domestic product (GDP) spent within the economy.

It is well known that Caribbean islands have excellent natural resources available for the generation of energy. However, despite the excellent renewable (wind, solar, geothermal, etc.) potential, there has been little progress in recent years to accelerate investment in renewable energy. The technologies exist, the natural resources are abundant and the economics are attractive, but for many islands gaps remain in the expertise to select the right solutions and the ability to attract investment and enable the Caribbean energy transition. While most islands are not large enough to create a significant impact on global carbon emission reductions, they are the ideal combination of geographical scale and renewable potential to demonstrate system-wide, sustainable solutions across an entire economy, and collectively show that this transition is both replicable and scalable.

In early 2015, the Carbon War Room-Rocky Mountain Institute (RMI-CWR) and Clinton Climate Initiative (CCI) agreed to bring their complementary skill sets together and form a partnership aimed at addressing the gaps, which have prevented transition to date. The purpose of the partnership is to successfully execute a joint program to accelerate the transition of Caribbean island economies from heavy dependence on fossil fuels to a diverse platform of renewables and energy efficiency and establish a blueprint for other isolated economies.

In late 2015, RMI-CWR and CCI joined forces with CARILEC to target utility practitioners to provide the information, support and tools required to facilitate utilities in making the transition from fossil fuel to renewable electricity generation. By leveraging the core competencies of CARILEC, RMI-CWR, and CCI, and collaborating on an agreed scope of work, this unique Partnership will:

- Identify the optimum solutions for islands
- Catalyse the flow of capital to renewable energy and energy-efficient systems
- Create an open playing field for technology providers able to deliver those systems

Overview: With the goal to foster renewable energy project deployment knowledge exchange and facilitate the sharing of experiences between island nations, a renewable energy community of practice (CoP) was conceived to support energy professionals in the Caribbean to transition from fossil fuels to indigenous, renewable energy sources. The CoP enables CARILEC, RMI-CWR, CCI, and development partners to ramp up the sharing of best practices and capitalize on existing knowledge base among energy professionals to stimulate energy transition in the Caribbean.

The overall objectives of CAREC are as follows:

- Foster continuous knowledge exchange between Caribbean utility engineers, government practitioners, and development partners active in the sustainable energy space;
- Provide a virtual and accessible knowledge platform and document repository focused on renewable deployment approaches, tools and templates;
- Strengthen partnerships between governments, utility companies and external specialists to draw upon and access state-of-the-art practices; and
- Create a new, online portal to deliver training developed and delivered by CARILEC and other development partners.

Since September 2015, CARILEC, RMI-CWR, and CCI began to assess the specific needs, services, and resources for prospective community members through a regional, online survey. The findings showed that this is no existing community site in the Caribbean that serves this audience, and also demonstrated a clear desire from Caribbean energy professionals, both utility and engineers and policy makers, to learn, exchange, and gain access to new, innovative decision-making support tools in order to advance RE projects in the region.

The CAREC community platform provides:

- Face-to-face and virtual activities to share knowledge and best practices to accelerate learning on renewable energy;
- Online knowledge-sharing platform to facilitate collaboration, discussions, and networking among island energy practitioners;
- Dedicated list serve to communicate, ask questions, and exchange with other island energy professionals;
- Training opportunities to build capacity and foster skills to meet increasing demands in renewable energy generation and distribution, and project implementation;
- Repository of manuals, tools, webinars, and training materials that can be easily accessed and stored;
- Peer network of local policymakers, utility executives & staff, project developers, and engineering, procurement & construction consultants; and
- “First-stop shop” to search energy information resources, models, project documents, upcoming events, and links to ask questions and request technical assistance.

The Discourse Platform Specialist (hereon referred to as the Consultant) will contribute to the platform design improvements required to build a best-in-class, robust, document repository into the existing platform and implement back-end platform improvements. The Consultant should be guided by key design principles of being: dynamic, easily accessible, cost-effective, and user-friendly.

Responsibilities: The purpose of this consultancy is to lead the technical design and launch of a user-friendly, cloud-based document repository that will be integrated into the existing virtual platform. In addition, the consultant will complete a number of platform upgrades as budget allows. The platform upgrades will take a phased approach: (i) design and consultation, (ii), launch and testing; and (iii) community-wide launch and implementation.

More specifically, the consultant will be responsible for completing the following tasks and deliverables:

Task 1: Develop the document repository upgrade plan after consultation with the core CAREC team, to be reviewed and approved by CARILEC and RMI-CWR. The plan will include: an assessment of hardware and software requirements, security and bandwidth, and costs.

Desired features include:

- Document tagging
- Browsing structure and hierarchy
- Filtered search
- Ability to link to relevant discussions
- Document rating

An easy-to-use, embedded, low-cost solution that meets the needs of the community is desired. Industry samples: [IRENA](#), [CESC](#) and [NREL](#).

Deliverable 1: A document repository project upgrade work plan in PPT. Upon submission and review of the plan, the tasks and expected days to complete each task will be adjusted accordingly. Deliverable 1 is expected to take **4-5 days**.

Task 2: The consultant will build the document repository and populate it with the existing CAREC documents – implementing tagging, structure and taxonomy.

Deliverable 2: A fully functioning version of the document repository in test for the core CAREC team to review and provide feedback (within 2 days). Consultant will make revisions in test until desired product is achieved. Upon completion of task consultant will move the repository from test environment to the “live environment”.

Deliverable 2 is expected to take **4-5 days**.

Task 3: Based on remaining project budget, the consultant will assess the level of effort required to make the following upgrades (estimating both the time and cost to complete each item) then implement the identified upgrades based on project scope:

- Upgrade the CAREC homepage color scheme and visuals
 - Per direction provided from the core CAREC team
 - New banner, new feature image, color scheme
 - Include feature boxes – per core team direction, “Member Spotlight”, etc.
- Create/build out the member list to resemble a membership expertise directory
 - Including a photo field, expertise listing field, etc.
- Live chat feature integration
 - Enable 1:1 chat within in CAREC platform, users can message other users directly

Deliverable 3: Based on consultant’s assessment, he/she will advise how long the suggested upgrade tasks will take to complete and clearly state what’s required from the core CAREC team to complete stated task (in a Google document or PPT). The core CAREC team will provide examples of other discourse sites for a baseline and be available for any/all questions. The consultant will complete the agreed upon upgrades upon CAREC team approval/sign off.

Deliverable 3 is expected to take **4-5 days**.

Timeline of Activities

Deliverable	No of Days	Suggested Timeframe
1	4-5	July 31- August 4
2	4-5	August 9-15
3	4-5	August 16-August 22

Payments: The consultant will submit an invoice after each deliverable or at the conclusion of the consultancy – based on preference. The proposed number of days to be allocated to each deliverable and timing is recommended and listed in the table. Total project consultancy costs will not exceed \$15,000.

Travel for this consultancy is not anticipated, but if deemed appropriate, associated expenses shall be reimbursed in accordance with RMI-CWR travel policies.

Reporting: The consultant will report to Justin Locke, Director of the RMI-CWR Islands Energy Program.

Prospective candidates should have a minimum of the following qualifications:

- Bachelors degree or vocational training on web design, information systems and collaboration platforms, or related experience;
- Minimum of 5 years of direct relevant experience;
- Proven experience in developing and upgrading discourse platforms that support communities of practice;
- Knowledge and experience in developing cloud based, knowledge networks and document repositories; and
- Experience in working with inter-disciplinary teams in community development planning.

Preferred qualifications include:

- Experience working with governments, regional organizations, multilateral and bilateral development agencies;
- Excellent computer and information technology skills, including GIS, html, and API development;
- Demonstrated ability to assess client groups' information needs and be innovative in the design and delivery of appropriate targeted solutions