

Request for Proposals: RFP # 52161



Idaho Energy Code Training and Technical Assistance

The Northwest Energy Efficiency Alliance (NEEA) is soliciting proposals for *NEEA's Idaho Residential and Commercial Energy Code Support*. Work will occur from January 1, 2022 through December 31, 2022, with the possibility of up to two, one-year extensions.

NEEA is soliciting proposals for program support for these Areas of Work:

- 1. Idaho State Energy Code Residential and Commercial Provisions
Technical Assistance**
- 2. Idaho State Energy Code Residential and Commercial Provisions
Training, Education and Stakeholder Engagement**

Bidders may respond to one or both Areas of Work listed above. Each Area of Work should be addressed separately and completely in the proposal. If bidding on multiple Areas of Work, please include an explanation of how your firm plans to coordinate all Areas of Work.

All bidders must electronically provide a completed "Intent to Respond" form (see Appendix A) and clearly indicate on the form each of the Areas of Work to which they intend to respond.

Key Dates for this RFP are as follows: (all times in Pacific Time)

- Intent to Respond forms and bidder questions due electronically by 5pm, December 1, 2021
- NEEA will provide answers to all bidder questions by 5pm, December 6, 2021
- Proposals due electronically no later than 5pm, December 20, 2021.

Send all communications related to this RFP to the RFP Point-of-Contact:

Tess Studley at Tstudley@neea.org

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1 Introduction

About the Northwest Energy Efficiency Alliance

The Northwest Energy Efficiency Alliance (NEEA) is an alliance of more than 140 utilities and energy efficiency organizations working on behalf of more than 13 million energy consumers. NEEA is dedicated to accelerating both electric and natural gas energy efficiency, leveraging its regional partnerships to advance the adoption of energy-efficient products, services, and practices.

Since 1997, NEEA and its partners have saved enough energy to power more than 985,000 homes each year. As the second-largest resource in the Northwest, energy efficiency can offset most of our new demand for energy, saving money and keeping the Northwest a healthy and vibrant place to live. www.neea.org

2 Background

NEEA supports building energy code development and implementation throughout the Northwest region (including Idaho, Montana, Oregon, and Washington). As part of this effort, NEEA contracts with entities in each state in the region to use their technical expertise to support code change proposals and provide education, training, and technical support for code implementation activities. NEEA also works on the national level, proposing code changes that may be incorporated into national model codes such as ASHRAE Standard 90.1 and International Energy Conservation Code (IECC). These model codes return to the region through state code adoption and establish a baseline for regional efforts.

Training and education of market actors and stakeholders is a key activity NEEA engages in to support states as energy codes are adopted and continue to progress building energy codes in the region.

3 Objectives

Work awarded through this RFP will support residential and commercial energy code implementation and future code readiness and adoption in Idaho. Work will aid builders, contractors, code officials, inspectors, architects, local elected officials, and other market actors in effectively implementing codes through providing technical support, education, and training.

The main goals of these activities are to bolster energy code compliance throughout the state of Idaho, especially in areas with high rates of new construction, but not excluding rural zones, and to provide market actors with the knowledge and skill set to build energy-efficient and code compliant buildings.

4 Related Resources

This section provides a list of resources and background information that are related to and inform the work within this RFP.

- Idaho Energy Code Training Online Learning Management System: <https://idaho.codestraining.com/learn/signin>
- Idaho Energy Code Website: <https://www.idahoenergycode.com/>
- Idaho Building Code Amendments: <https://adminrules.idaho.gov/rules/current/24/243930.pdf>
- Idaho Energy Code Collaborative 5-year Strategic Plan (Attached to this RFP as Appendix B)

5 Approach and Methodology

The selected contractor(s) will provide technical assistance by establishing, managing, and responding to email and phone inquiries for a broad group of Idaho building stakeholders, providing individual outreach to jurisdictions (known as the Circuit Rider function), and developing and refining training tools and resources. The selected contractor(s) will be charged with providing training, education, and stakeholder engagement to building code officials, inspectors, builders, contractors, trades, architects, local elected officials, real estate agents and other market actors. In the absence of this role, the energy code information available to building code building code market actors would be severely reduced.

The selected contractor(s) will also conduct informal stakeholder needs assessments that will lead to improvements and updates to the Idaho energy code, the existing training resources, and presentations. Finally, the selected contractor(s) will be required to coordinate with existing entities around the state including state and local agencies, utilities, and members of the Energy Code Collaborative to ensure continued support of the energy code.

At this point, any in-person trainings are subject to prior NEEA approval and adherence to [NEEA's COVID safety guidelines](#).

Summary of the work:

1. Residential and Commercial Energy Code Technical Assistance:
 - a. Establish and manage email and phone inquiries and communication services.
 - b. Perform Circuit Rider function (outreach and assistance to jurisdictions and stakeholders).
 - c. Resource Development.
2. Training, Education and Stakeholder Engagement:
 - a. Develop and deliver educational resources and training on the most recent Idaho energy code version to key market actors.
 - b. Support the online training registrations, online learning platform and distribution of continuing education certificates.
 - c. Stakeholder engagement including participation in the Idaho Energy Code Collaborative and partnering with members of the Collaborative, including local utilities, on training and educational events, studies or additional outreach as deemed necessary by the Collaborative.

6 Contractor Qualifications

NEEA encourages proposals from all firms with relevant experience and from teams of experienced contractors with a track record of working together to meet or exceed the goals of assigned programs and/or projects. The winning bidder(s) needs to demonstrate a thorough understanding of Idaho State Energy Codes and the capacity to execute items outlined in the appropriate sections of this RFP.

The following qualifications are preferred:

- Knowledge of:
 - The 2018 International Energy Conservation Code (IECC) and Idaho Amendments
 - Residential construction best practices, new technologies, and whole home efficiency best practices
 - Commercial construction best practices, new technologies, and whole building efficiency best practices
 - The Idaho code development process
 - Idaho Zero-Based Regulation legislative requirements
- Strong technical training expertise in residential and commercial new construction topics, including offering training in-person and online, and experience developing training content on emerging technologies and advanced building strategies.
- Experience providing technical support to builders, code officials, and other market actors on residential and commercial building energy codes.
- Understanding of Idaho utility new construction programs and voluntary certification programs.
- Experience working with residential and commercial contractors, subcontractors, trades, architects, engineers, code officials, and inspectors.
- Experience with learning management system platforms, website development and maintenance, and continuing education accreditation.
- Strong relationships or former experience working with state and local agencies on the support of energy code adoption and implementation.
- NEEA strongly prefers that the selected contractor(s) have an established physical presence in Idaho.

7 Scope of Work

The selected contractor(s) will support the Idaho Energy Code through technical assistance, training, and code interpretation. Through this RFP, NEEA seeks to select a contractor, or several contractors, to support the following two Areas of Work. NEEA encourages respondents to bid on one or more of the Areas of Work listed below. NEEA is open to multiple contracting scenarios: contracting with a prime contractor supported by subcontractors, contracting with one contractor for multiple Areas of Work, or contracting with one contractor for each Area of Work (though this last scenario is less preferred). NEEA requests that bidders structure their proposal to balance program management efficiency and subject matter expertise. Bidders should indicate in the Intent to Respond form which areas of work they plan respond to in their proposal.

1. Idaho State Energy Code Residential and Commercial Provisions Technical Assistance

- a. Provide ongoing support to the construction industry, code officials, homeowners, and others who have code related questions by answering direct questions via phone and email inquiries.
- b. Review and update existing energy code technical support documents, compliance materials, and tools for the latest energy code including worksheets, code compliance forms, checklists, factsheets, and frequently asked questions. Ensure that these resources are made available to the public and industry stakeholders via the Idaho Energy Code website.
- c. Assist local jurisdictions, permitting departments, building officials, and design and construction professionals by providing energy code assistance (known as the Circuit Rider) through:
 - Education, training, and technical assistance for Idaho code jurisdictions and other industry professionals, and
 - Assistance with code interpretations, installations, and enforcement techniques.
- d. Review and summarize trends found within the inquiries coming through the email and phone hotline which will be utilized to improve education and training efforts under Area of Work 2.
- e. Develop and distribute (using an existing distribution list to be provided by NEEA) a monthly or bi-monthly digital newsletter highlighting relevant energy code topics.
- f. Maintain the [Idaho Energy Code](#) website, including training calendar, utility program information, resources, and code updates.
- g. Coordinate and participate in various internal and external meetings, including with NEEA program team, NEEA evaluation team, the Idaho Energy Code Collaborative, and other market actors at minimum on a quarterly basis and as needed.

2. Idaho State Energy Code Residential and Commercial Provisions Training, Education and Stakeholder Engagement

- a. Develop new and update existing training content and educational resources that explain the latest Idaho energy code requirements and specific building code components such as mechanical system design, duct testing, and air leakage testing. All training content developed under the awarded contract will belong to NEEA and be made available to the public through NEEA's online training platform and the Idaho Energy Code website.
- b. Deliver residential and commercial energy code trainings throughout the year and throughout the state, prioritizing locations based on building permit activity. Trainings will be delivered online via webinars and on-demand trainings. Bidders should assume there will be a minimum of xx trainings on an annual basis.

- Collaborate with the following organizations such as the Idaho Association of Building Officials (IDABO), Association of Idaho Cities (AIC), American Institute of Architects (AIA), trade associations, and others to offer and provide more individualized trainings on the Idaho energy code. Bidders should assume a minimum of one training per year for each organization.
- c. Manage the Idaho Energy Code Learning Management System (LMS) including assisting with training registration, maintaining and updating the training calendar and course descriptions, and providing webinar support. (NEEA uses the Docebo LMS platform).
- d. Promote trainings through emails, fliers, and cross-promotion.
- e. Develop and deliver quarterly training surveys with the purpose of collecting feedback from attendees on the quality of training, content delivered, and impact of training on building practices. Feedback should be incorporated into future trainings to improve and increase the impact of training sessions.
- f. Review and analyze email and hotline inquiries and trends and incorporate into improved future trainings and educational materials.
- g. Acquire Continuing Education Credits for trainings and distribute certificates to attendees or coordinate with IDABO to distribute.
- h. Coordinate and participate in various internal and external meetings, including with NEEA program team, NEEA evaluation team, the Idaho Energy Code Collaborative and other market actors at minimum on a quarterly basis and as needed.
- i. Engage and coordinate with other state organizations and utilities such as IDABO, AIC, Idaho Power, and Avista to identify opportunities related to education events, studies or additional outreach and provide recommendations to NEEA and the Collaborative.

7.1 Deliverables

Deliverables for Area of Work #1 include, but are not limited to the following:

1. Monthly summaries of technical support activities provided.
2. Quarterly reports identifying trends and popular topics of inquiry as received via email and phone hotline.
3. Updated code support documents as needed.

Deliverables for Area of Work #2 include, but are not limited to the following:

1. Annual training plan identifying dates, topics, target audiences and delivery mode of residential and commercial energy code trainings.
2. All developed and updated education and training resources, presentations and materials delivered to NEEA and made publicly available on the LMS and Idaho Energy Code website.
3. Quarterly training reports summarizing training dates, topic, duration, and number of attendees, using NEEA provided template.
4. Survey results summarized quarterly and presented to the Collaborative.

7.2 Timeline

NEEA anticipates work beginning on or near January 1, 2022 and continuing through the end of December 2022, with the possibility of up to two, one-year extensions at NEEA's sole discretion.

7.3 Budget

Proposals should be provided on a time and materials basis. Bidders should provide a competitive budget estimate that is sufficient to cover their proposed work. The maximum budget for the entire scope of this project for 2022 is \$200,000 and bidders should provide an overall proposed budget broken out by Areas of Work.

8 Proposal Submission

Bidder shall submit (1) electronic copy of the proposal by the end of business day listed in the RFP schedule below.

8.1 RFP Schedule

12/1/2021	Intent to Respond Form and bidder questions submitted by
12/6/2021	Answers to questions e-mailed back by
12/10/2021	Conference call held on
12/20/2021	Proposals due by
12/31/2021	Anticipated award date

8.2 RFP Point of Contact

All correspondence, included but not limited to, questions and submissions shall be directed to:

Tess Studley
Program Manager, Codes and Standards
E-mail: tstudley@neea.org

8.3 Intent to Respond

All "Intent to Respond" forms (see Appendix A) must be received no later than by the end of business day listed in the RFP Schedule.

Only those parties submitting the "Intent to Respond" form will be provided with updates to the RFP, have questions responded to, be invited to the conference call, and have their proposals considered.

8.4 Proposal Format

1. **Executive Summary** – Include the key strategies and approach to completion of the scope of the work; proposed costs; and the reasons NEEA should select your team
2. **Approach to Project (Tasks and Deliverables)** – Provide a detailed description of the specific methodologies and approach to be undertaken to complete the scope. Be sure to include project management activities in

proposed implementation strategy as well. Identify all major phases and milestones for the project and the associated deliverables.

3. **Project Timeline & Cost Estimate** - Provide the proposed timeline for all major phases and milestones of the project broken out by proposed task and associated deliverables. Include the cost estimate for each task. A breakout of any direct costs and an hourly rate sheet for the project period should be included in the Proposal Appendix section.

8.4.1 **Proposal Appendix Items (Please limit to no more than 5 pages)**

- Hourly Rate Sheet – Provide the hourly rate and estimated number of hours for each project team member, by task.
- Brief description of company background & qualifications
- Project Team & Team Bios – Include information about program team members and team structure, past team efforts on similar work, years of experience and other relevant qualifications.
- Examples of past work or related projects.

9 **Selection & Preferred Insurance**

9.1 **Scoring**

Bidding firms will be rated among others in terms of the overall responsiveness to the RFP – how well all RFP requests have been addressed including, but not limited to:

1. Responsiveness to the RFP and demonstrated understanding of the issues surrounding the project.
2. The thoughtfulness and appropriateness of the proposed methodology used to accomplish the desired results of the project.
3. The experience and qualifications of the individuals specifically proposed to execute and manage the project.
4. The experience of the firm or team of firms making the proposal.
5. The capability to execute the plan, including past experience and aptitude for collaboration.
6. Overall value for expenditure.

Proposals may be evaluated by the NEEA Project Manager and other NEEA staff that we believe have the perspective needed to make this important decision. NEEA is under no obligation to provide work to any vendors responding to this solicitation, nor is there any obligation or intent implied to reimburse any party for the cost of preparing a proposal in response to this RFP.

9.2 **Preferred Insurance**

Firms interested in working with NEEA should be aware of the following insurance requirements for all NEEA vendors.

Vendors must maintain adequate and reasonable insurance covering their performance under any offered contract, including, but not limited to Commercial General Liability insurance of at least \$1,000,000/occurrence, Business Automobile Liability insurance, and any workers' compensation and unemployment insurance

required by law. Professional Liability and Cyber Liability insurance may also be required. NEEA may request a copy of such insurance policies prior to awarding work.

See sample terms and conditions for additional information about minimum insurance requirements: <https://neea.org/img/documents/sample-neea-contract-terms-and-conditions.pdf>.

Appendix A - Intent to Respond Form

RFP #: 52161

Project Title: Idaho Energy Code Training and Technical Support
NEEA Point of Contact: Tess Studley, tstudley@neea.org

PLEASE PRINT:

Company	
Address	
City, State, Zip	
Contact Name	
Contact Title	
Phone #	
E-mail	

The company named above intends to submit a proposal in response to NEEA’s request for proposal listed above. Deadline for submitting the “Intent to Respond” form is end of business day of date listed in the RFP schedule.

Please select which Area(s) of Work you plan on bidding:

- Area of Work #1: Idaho State Energy Code Residential and Commercial Provisions Technical Assistance
- Area of Work #2: Idaho State Energy Code Residential and Commercial Provisions Training, Education and Stakeholder Engagement

List any Disadvantaged Business Enterprise (DBE) certifications and the state of the certifications below:

Signature of Authorized Representative _____

Print Name _____

Title _____

Date _____

Appendix B - Idaho Energy Code Collaborative 5-Year Strategic Plan



Idaho Energy Code Collaborative 5-Year Roadmap, 2020 – 2024

December 31, 2019

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1.0 Mission

The mission of the Idaho Energy Code Collaborative is to:

- facilitate energy code implementation through education, outreach and technical assistance
- prepare for new energy codes by analyzing changes, engaging stakeholders for input and delivering industry-vetted (not necessarily consensual) proposals to the Idaho Building Code Board
- provide resources to the residential and commercial energy code industry, which includes, contractors, trades, designers, developers and code jurisdictions to facilitate greater understanding of and compliance with energy codes

2.0 Vision

The vision of the Idaho Energy Code Collaborative is to be a trusted resource for vetting energy codes that are based on the national model energy codes and standards and support the implementation of the Idaho adopted code.

3.0 Goals

The goals provide the framework for the Idaho Energy Code Collaborative to develop annual work plans over the next five years that will achieve the following:

- Support the residential and commercial design and construction industry through in-person and online training on the current Idaho energy codes. Illustrate transition paths to the next code cycle using best practice examples.

- Support building jurisdiction implementation of the energy code through training, resources and technical assistance. Ensure that resources for jurisdictions and industry professionals (see goal above) have interactive overlap.
- Build and enrich a relationship with key stakeholders as we vet the latest version of the national model energy codes and standards. Provide a trusted assessment of the codes to the Idaho Building Code Board.
- Develop an on-going education and outreach plan for elected officials on the value of energy codes.

4.0 Background

The Idaho Energy Code Collaborative meets bi-monthly and is made up of members from the following organizations:

Association of Idaho Cities (AIC), Idaho Division of Building Safety (DBS), Idaho Association of Building Officials (IDABO), Idaho Power, Avista, Idaho Governor’s Office of Energy and Mineral Resources (OEMR), University of Idaho Integrated Design Lab (IDL), Eco Edge, Cadmus, and New Buildings Institute, as well as the Idaho Energy Code Circuit Rider. These industry experts comprise the Collaborative, which facilitates a larger group of stakeholders who provide research and insight to the Idaho Building Code Board on code adoption and appropriate amendments to the IECC. The Board then provides evidence-based recommendations on code adoption to the Idaho Legislature.

The code adoption process is dictated by Title 39 Health and Safety Chapter 41 Idaho Building Code Act. Codes are evaluated by the Idaho Building Code Board through the negotiated rulemaking process as established in section 67-5221 of the Idaho Code, which requires two public hearings that are not less than 60 days apart before they make a formal recommendation regarding adoption to the Idaho Legislature before the next session begins. (In actuality, there are typically three public hearings. At the first two public hearings, proposals and amendments can be made.) The Idaho Energy Plan recommends that codes are evaluated every three years, which is consistent with new code introductions nationally by the International Code Council (ICC) and there is strong support across audiences for statewide codes to be consistent with national standards. Recent code editions have been 2012 and 2015. The Legislature will decide on adoption of the 2018 codes in early 2020.

5.0 Challenges to Energy Code Adoption and Compliance

The challenges are specific issues identified by members of the Idaho Energy Code Collaborative that could hinder the achievement of goals related to new code adoption and compliance with existing codes. The challenges to address and ideally overcome include:

- Cost
- Education
- Consistency in adoption, messaging, interpretation and enforcement
- Anti-regulatory sentiment
- Relationship building
- Insufficient data/analysis
- Technology
- Outreach (reach them not come to us)
- Housing affordability

6.0 Target Audiences

This section describes the audiences to target for relationship building, training or outreach. These audiences are further detailed as key players who have the most significant effect on whether goals are achieved or not.

Target audiences include:

- Elected officials
- Builders/contractors/trades
- Design professionals
- Code officials
- Idaho Building Code Board
- General public
- Real estate professionals, appraisers and lenders

Key players include:

- IDABO/Circuit Rider
- Idaho Energy Code Collaborative
- NEEA
- AIC
- NARI
- DBS
- Legislators
- BCA
- Building officials

7.0 Opportunities

This section describes the actions being taken by the Idaho Energy Code Collaborative to overcome challenges, work with key players, build relationships, align training with goals and conduct outreach to make progress towards goals.

Action	Target Audience or Key Player
Technical assistance	Code officials, builders, designers
Training on best practices	Code officials, builders, designers
Support better enforcement of codes	Code officials
Deliver consistent messaging	Code officials, builders, designers
Respect builder concerns that we don't affect production	Builders
Work with practical applications in the field	Builders
Encourage consistent enforcement	Code officials
Manage collaborative relationships and communication	Idaho Energy Code Collaborative
Administer collaborative communication	Idaho Energy Code Collaborative
Build relationships between elected officials and enforcement officials	Elected officials, Code officials

Raise awareness of legislative luncheons	Elected officials
Share legislative activities	Idaho Energy Code Collaborative
Offer webinars as part of fall and spring academies	AGC, AIA, BCA
Reach out for support of code adoption and implementation	AGC, AIA, BCA
Meet with professional organizations	Designers, Engineers
Support code training especially during pre-adoption	Designers, Engineers
Marketing and communication on energy efficiency	General public
Employ 15 energy advisors in the field	Designers, Engineers, Builders
Offer code training to members	Code officials, Designers, Engineers, Builders
Relationship building	BCA
Host legislative luncheons	Elected officials
Booth at spring and fall home shows	General public
Social media campaigns	General public
Supply tools and resources necessary to support the market	Code officials, Designers, Engineers, Builders, Elected officials, General public, utilities, Idaho Energy Code Collaborative
Support communication and outreach	Idaho Energy Code Collaborative
Provide support for uniform enforcement in Eastern Idaho	Building officials
Strategic planning	Idaho Energy Code Collaborative
Develop consistent messaging	Idaho Energy Code Collaborative
Review, track and participate in national codes and standards updates	Idaho Energy Code Collaborative

8.0 Messaging

A messaging workshop was conducted in 2012 by Eco Edge and Resource Media that resulted in a communications guide for “Building Stronger Energy Codes in Idaho.” More than a dozen Idaho stakeholders participated including government agencies, builders, utilities, energy efficiency advocacy organizations and others. Participants discussed a wide range of challenges and potential strategies for effective communications around energy codes, focusing on how to break through barriers and create a greater understanding and appreciation of the value of energy codes among decision makers and their constituents. Key takeaways from this discussion that will help inform strategy were:

- Avoid technical and governmental messages and messengers
- Focus messaging on comfort, health and savings
- Position energy codes as providing better choices and consumer protection
- Highlight the benefits of stronger energy codes for builders

The message recommendations include:

1. Strong energy codes save Idahoans money and improve comfort and health
2. Strong energy codes protect Idahoans and provide better choices
3. Energy efficiency homes are more desirable and affordable

The communications guide provides sample messages for each of these recommendations.

More recent input has been to factor in the value of consistent and predictable codes and to address durability and safety. And, more indirect messaging could address air quality and reduced demand for power generation and transmission. Because culture can shift over time, it is planned to conduct a messaging workshop with the Idaho Energy Code Collaborative in early 2020 to affirm this messaging or update it.

9.0 Timeline

Each year as work plans are being developed, the Idaho Energy Code Collaborative is tasked with asking the following questions:

- What do we want to achieve when?
- How do we measure success?
- Who is responsible?
- Is each task in alignment with the mission, vision and goals?