

# REQUEST FOR PROPOSALS

## ENERGY CODE TRAINING SERVICES



**300 E. 39<sup>th</sup> Street**  
**Kansas City, Missouri 64111**  
**(816) 531-7283**  
**<https://metroenergy.org>**

Name of Submitting Business:

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**Due: March 3, 2022, at 2:00PM CST**

**RFP – Energy Code Training Services**

[metroenergy.org/rfp-energy-code-training](https://metroenergy.org/rfp-energy-code-training)

<b>RFP Issue Date:</b>	2/3/2022
<b>Pre-Proposal Meeting:</b>	2/15/2022 11:00am CT
<b>RFP Questions Deadline:</b>	2/22/2022
<b>RFP Submission Deadline:</b>	3/3/2022 2:00pm CT
<b>Expected Date for MEC Selection Notification:</b>	3/10/2022
<b>Expected Timeframe for Award Negotiations:</b>	03/2022
<b>Updates, Q&amp;A, pre-proposal meeting:</b>	<a href="https://metroenergy.org/rfp-energy-code-training">metroenergy.org/rfp-energy-code-training</a>

**Minority and Women’s Business Enterprises (MBE or WBE) currently registered with the City of Kansas City, Missouri, as MBE or WBE must lead all responses to this solicitation. MBE’s are preferred, pursuant to a contract with the City.**

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## General Information

### Objective

Metropolitan Energy Center (MEC) is issuing this Request for Proposals (RFP) seeking proposals from training or energy related agencies (Offerors) for the performance of Energy Code Training Services for Metropolitan Energy Services (MEC). Offerors will be qualified to deliver commercial and residential energy code training within the Kansas City metro. Energy code training will be delivered to building officials, plan reviewers, building inspectors, electrical inspectors, plumbing inspectors and mechanical inspectors. Additional target audiences may include architects, engineers, designers, licensed residential builders, home building associations, alterations and maintenance contractors, and energy analysis professionals.

It is expected that this proposal will secure the Training Services outlined herein for the period from March 15, 2022, through June 30, 2024. Upon mutual agreement between MEC and the Offeror, services may be extended for two (2) additional, one (1) year periods for a maximum term of five (5) years in total.

### Funding Allocations

The contracts are supported by federal grant funds via the City of Kansas City, Missouri (KCMO). Funding is available to start immediately upon placement.

### Eligible Entities

MEC will not make awards to individuals. Offerors must be registered as a WBE or MBE with the City of Kansas City Missouri. MBEs are preferred, pursuant to an active contract with the City. Proposals from a consortium of agencies led by an eligible entity will also be considered.

### Separable Service Awards

MEC reserves the right to select one, two, or no service offers.

## Scope of Services

### Introduction and Overview

The purpose of this Request for Proposals (RFP) is to identify an agency (Offeror) to provide Energy Code Training. The Offeror will work on training needs as described in detail in Attachment A.

### Scope of Services

- A. The Offeror(s) shall furnish training services as described in Attachment A: Scope of Services.
- B. If during the contract period, services not listed on Attachment A are required, MEC may solicit price quotations from the Offeror and add services/trainings to the contract.
- C. There is no guarantee of any minimum amount of Energy Code trainings that may be requested during the term of the contract.

### Requirements

- A. The Offeror must manage scope and budget to meet strict timelines, address issues, and track action items.
- B. Local travel will be required for the trainings.

- C. Any resulting contract shall not constitute an employment relationship between MEC and Offeror. Personnel providing the training shall be employed by the Offeror. The Offeror shall be responsible for all payroll taxes, workers' compensation, payroll reports, applicable insurances, and other employer federal and state requirements for contract personnel.
- D. Contract services supplied by the Offeror must meet minimum specifications as specified by MEC (see Attachment A).
- E. The Offeror shall assign a single point of contact to coordinate and assist in any training requests, availability, scheduling, billing, contract compliance requirements, reports and problem solving. When requested, the Offeror must meet periodically with MEC to discuss training course requirements.
- F. MEC will assign, and identify to the Offeror, the person(s) who is authorized to request services. A telephone call or email from MEC authorized representative, along with a job requisition, shall constitute a request for service under this contract. MEC will not pay any invoices without a corresponding signed job requisition.
- G. The Offeror will be paid based on invoices submitted, as verifiable by supporting documents and trainings delivered. Invoices shall be submitted by the Offeror to MEC on a periodic basis as specified in your proposal's price quotes and agreed to by MEC. Invoices may be presented no more frequently than monthly, upon completion of a training course. Invoices may be based on time and materials or on deliverables as specified in your proposal's price quotes and agreed to by MEC. The invoices should include the services provided, dates, and upon completion of a training course. If personnel time is billed, a timecard or equivalent should be presented that includes hours worked, job classification, and the hourly bill rate and pay rate. MEC shall not be liable for invoices that cannot be substantiated by the Offeror.
- H. The Offeror shall be responsible at all times for the actions and work of its personnel.

#### All Inclusive Services

Additional work necessary to meet the terms of service under the above scope of work should be identified and included in Proposals.

### Response Format & Proposal Requirements

#### General Instructions

To be considered, each Offeror must submit a response to this RFP using the format provided below. Proposals should be prepared simply and economically providing a straightforward, concise description of the Offeror's ability to meet the requirements of the RFP.

Proposals should be organized into the following Sections:

- A. Cover Page (identify Authorized Negotiator)
- B. Professional Qualifications
- C. Past Involvement with Similar Projects
- D. Proposed Work Plan

## E. Price Proposal

Proposals, including cover page and table of contents, if provided, will consist of an electronic file responding to the narrative requirements, which may contain exhibits as necessary to illustrate past work or example training curricula. Each will be submitted on 8.5 x 11 – inch page format with 11- or 12-point font in black text. No hard copy proposals will be accepted. Digital proposals in PDF format must be sent to Jeff Windsor at [rfp@metroenergy.org](mailto:rfp@metroenergy.org).

Any confidential/proprietary information should be readily identified, marked and included in ONE (1) additional attached document, separate from the rest of the proposal (see Section IV.A. Proprietary/Confidential Information).

### Criteria for Evaluation

All proposals will be reviewed by a Review Committee consisting of MEC staff and other members offering technical evaluations and assistance, as necessary. Offerors will be notified when and if additional information or documentation is required. All information required to complete the proposal for funding is provided in this RFP. Any additional information pertaining to submissions, including email and phone calls, will not be considered once the review process is under way.

When evaluating proposals, the Review Committee will consider the following criteria. The overall quality of the proposal, containing all required information in a clear and concise format, is a prevailing consideration throughout all categories. The potential maximum number of points is listed to the right for each category.

<b>CATEGORY</b>	<b>Points</b>
<b>QUALIFICATIONS</b>	40
<b>PAST INVOLVEMENT WITH SIMILAR TRAININGS/PROJECTS</b>	20
<b>PROPOSED WORK PLAN</b>	20
<b>PRICE PROPOSAL</b>	20
<b>TOTAL</b>	<b>100</b>

The following describes the elements that should be included in each of the proposal sections and the weighted point system that will be used for evaluation of the proposals.

### A. Cover Page Contents

1. Full name and address of your organization and, if applicable, the branch office or other subsidiary element that will perform, or assist in performing, the work hereunder.
2. Name, email and phone number of proposal contact.
3. State MBE and/or WBE certifications

4. State whether you are offering as a consortium of service providers, and if so, list your partners or co-proposers.
5. Identify the Authorized Negotiator. Provide the name, phone number, and e-mail address of the person(s) in your organization authorized to negotiate an agreement with MEC

B. Qualifications – 40 points

1. Indicate whether your firm operates as an individual, partnership, or corporation. If as a corporation, include whether it is licensed to operate in the State of Missouri.
2. Include the name of executive and professional personnel by skill and qualification that will be employed in the work. Qualifications and capabilities of any subcontractors must also be included.
3. Address trainer qualification requirements listed in Attachment A: Scope of Services, including but not limited to:
  - i Identify certifications and length of experience working with and providing training for HERS, LEED and Energy Star.
  - ii Specify CEUs offered and certifying authority.
4. State history of the firm, in terms of length of existence, types of services provided, etc. Identify the technical details that make the firm uniquely qualified for this work.
5. Describe MBE/WBE status and certifications. If the Offeror is certified as MBE or WBE with a local municipality (KCMO preferred), give type of certification, date of certification and history. Submit evidence that the certification is current.

C. Past Involvement with Similar Projects – 20 points

The written proposal must include a summary of the Offeror's demonstrated experience providing training to business, nonprofit, or government agencies. A complete list of client references must be provided for similar projects recently completed. It shall include the reference's name, address, telephone number, project title, and contact person.

D. Proposed Work Plan – 20 points

Provide a detailed and comprehensive description of how the Offeror intends to provide the services requested in this RFP, including process and timeline for assigning personnel, providing services/trainings in a timely manner, and plan for communicating and understanding the needs of MEC. The work plan must include a description of the Offeror's employee training plan and its ability to provide personnel with appropriate minimum experience and licensing requirements.

#### E. Price Proposal - 20 points

Offeror shall prepare and submit a price proposal, specifying whether it is based on time and materials or on piece work and deliverables. If the former, price quotations are to include the names, title, hourly rates, overhead factors, and any other relevant details for pricing key staff that would likely be involved with projects. Offeror shall be capable of justifying the details of the price proposal relative to personnel costs, overhead, how the overhead rate is derived, material and time.

#### Pre-Proposal Meeting and Questions

A pre-proposal meeting will be held on **February 15, 2022, at 11:00AM CST**. During the meeting, MEC staff will conduct a walk-through of the RFP document. The meeting will be conducted on-line only; on-line attendees must register in order to join this meeting at:

#### **RFP – Energy Code Training Services**

**Please register for the online meeting:**

<https://register.gotowebinar.com/register/3901618531495364880>

Offerors will have the opportunity to ask questions about MEC and the proposal process. A recording of the meeting will be made for prospective Offerors who cannot participate at the time of the meeting.

Offerors are also encouraged to submit questions in writing to Jeff Windsor at Metropolitan Energy Center at [rfp@metroenergy.org](mailto:rfp@metroenergy.org) by **February 22, 2022**. MEC will try to respond to all questions publicly via an FAQ on its website, [www.metroenergy.org](http://www.metroenergy.org), by **February 24, 2022**. Emails should use the subject line: “Query for Energy Code Training RFP”.

#### Proposal Submission

Proposals must be received by **March 3, 2022**. MEC is not responsible for technical or transmittal issues when submitting a proposal. All proposals with a MEC inbox timestamp of **2:00 PM CST** or after will automatically be disqualified from the current selection round with no exceptions.

Only electronic proposals will be accepted. Hard copy proposals will not be accepted. Please e-mail your proposal to [rfp@metroenergy.org](mailto:rfp@metroenergy.org) subject: **“Energy Code Training Services–<Organization/Company Name>”**. Proposals, including cover page and table of contents, will consist of 1. an electronic file responding to the narrative requirements, and 2. a separate file or files with portfolio materials. Again, Confidential/Proprietary information must be readily identified, marked and separated/ packaged from the rest of the proposal. MEC requests that all materials be included as attachments to one email. Offerors will receive an e-mail response notification of the receipt of their proposal within two business days upon submission.

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## **Administrative Information**

### **A. Proprietary/Confidential Information**

Any restrictions of the use of or inspection of material contained within the proposal shall be clearly stated in the proposal itself. Written requests by the Offeror for confidentiality shall be submitted to MEC in advance of the proposal submission deadline, along with the proposal material. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary.

Confidential/Proprietary information must be readily identified, marked and separated/packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable. Neither a proposal in its entirety, nor proposal price information will be considered confidential and proprietary. Any information that will be included in any resulting Agreement cannot be considered confidential.

### **B. Organizational Conflict of Interest - Requirements of this Proposal and Subsequent Agreement**

Any business entity or person is prohibited from being awarded an Agreement, if the business entity or person has an “Organizational Conflict of Interest”—as described below—with regard to this solicitation and the resulting Agreement. Offerors should provide a brief written statement noting any conflict of interest within the “Organizational Conflict of Interest” section of the Proposal.

No person or business entity engaged by MEC to prepare the original proposal, or who has access prior to the solicitation to sensitive information related to this procurement process, including, but not limited to requirements, statements of work, or evaluation criteria, will be eligible to directly or indirectly submit or participate in the submission of a Proposal for this solicitation. MEC considers such engagement or access to be an Organizational Conflict of Interest, which would cause such business entity or person to have an unfair competitive advantage.

If MEC determines that an Organizational Conflict of Interest exists, MEC has discretionary power to cancel the Agreement award. In the event the Awarded Offeror was aware of an Organizational Conflict of Interest prior to the award of the Agreement and did not disclose the conflict to the procuring Offeror, MEC may terminate the Agreement for default.

### **C. RFP Response Material Ownership**

MEC has the right to retain Offerors’ original RFP Submission and other RFP response materials for its files. As such, MEC may retain or dispose of all copies as is lawfully deemed appropriate. MEC has the right to use any or all information/material presented in reply to the RFP, subject to limitations outlined in the section, Proprietary/Confidential Information. Offeror expressly agrees that MEC may use the materials for all lawful purposes, including the right to reproduce copies of the material submitted for purposes of evaluation, and to make the information available as required by law or regulation.

### **D. Binding Offer**

A Proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the signature of an officer of the Offeror legally authorized



to execute contractual obligations and shall bind the Offeror to the proposal. By submitting a proposal, the Offeror affirms its acceptance of the terms and requirements of this RFP, including its attachments and appendices, without exception, deletion, or qualification, and does so without making its offer contingent. The Offeror further agrees to cooperate with MEC and expedite the contracting process upon notice of award.

MEC reserves the right to make partial awards or no awards.

### **E. Debarment and Suspension**

By submitting a proposal in response to this RFP the Offeror certifies that it, its principals, and proposed sub-contractors (if any):

- Are not presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal debarment or agency;
- Have not within a three-Year period preceding the Due Date of this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or Agreement under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;
- Are not presently under investigation for, indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in Paragraph IV.K.2 of the Code of Federal Regulations (CFR); and
- Have not within a three-Year period preceding the Due Date of this proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

If the Offeror is unable to certify to any of the statements in this certification, an explanation must be provided as an attachment to the proposal. The inability of the Offeror to provide the certification will not necessarily result in disqualification of the Offeror. The explanation will be considered in connection with MEC's determination whether to select an Offeror.

### **F. Disclaimer**

All statistical and fiscal information contained within this RFP, and any amendments and modifications thereto, reflect the best and most accurate information available to MEC at the time of RFP preparation. No inaccuracies in such data shall constitute a basis for legal recovery of damages or protests, either real or punitive, except to the extent that any such inaccuracy was a result of intentional misrepresentation by MEC.

### **G. IRS Form W-9**

Offeror will be required to provide MEC an IRS Form W-9.

### **H. DUNS Number**

Offeror is required to provide their DUNS/SAM in their proposal, or a pledge to obtain one prior to beginning work. Additionally, successful Offerors are required to submit their DUNS prior to the Agreement, or purchase order issuance, or payment from MEC.

**I. Incurred Costs**

MEC is not liable for any cost incurred by the Offeror prior to issuance of a legally executed Agreement, purchase order or other authorized acquisition document.

**J. Compliance with all Federal, State and Municipal Laws and Regulations**

Successful Offerors shall comply with applicable Federal, State, and local laws and regulations in the performance of all work under resulting Agreement. Offeror shall obtain all Federal, State, and local permits, authorizations, and approvals of all work performed under the Agreement.

**Award Determination**

Additional information may be requested from Offerors by MEC prior to final award determination. MEC is under no obligation to fund any proposal and reserve the right to deny proposals for any reason. Proposals meeting all the program's general policy guidelines may not necessarily receive an award. MEC reserves the right to delay any decision due to budgetary constraints.

MEC reserves the right to vary from the evaluation criteria listed within this document during the bid solicitation period as necessary or appropriate. Any modifications to evaluation criteria will be posted to MEC's website. It is the responsibility of the Offeror to check for these changes.

The selection notices are anticipated to be made in early March, 2022, and Offerors will be notified of the Review Committee's determinations via email. Awardees are expected to sign and return the Agreement to MEC within 4 weeks of receiving the document unless otherwise noted in writing by the MEC Contract Specialist.

For Information:

**Jeff Windsor, Contract Specialist**  
**Metropolitan Energy Center**  
**300 East 39<sup>th</sup> Street**  
**Kansas City, MO 64111**  
[jeff@metroenergy.org](mailto:jeff@metroenergy.org)

## **Attachment A: Scope of Services**

### **Energy Code Training for Kansas City Metro Building Officials**

Offerors should provide proposals based on description below.

An expert in building construction and energy codes is required to work with MEC Building Performance staff to customize their training curriculum for energy codes, and then deliver two four-hour courses in each training session for building code officials and inspectors to learn about measures in the 2018 and 2021 International Energy Conservation Code (IECC). This would be for .8 total credits over the course of two days. The course will focus on the details of code changes to both the residential and commercial code upgrades pertinent to the Kansas City Metropolitan region. This includes infiltration and duct testing requirements, understanding the standards used by Home Energy Rating System (HERS) Raters, reading common reports related to these items and other energy-code related requirements.

#### **Task 1 Finalize Training Curriculum**

Offeror should bring to the table a suitable energy code training curriculum for municipal building officials. MEC reserves the opportunity to collaborate with the Offeror to customize the training curriculum for our local audiences.

#### *Length*

Two, 4-hour courses for Continuing Education Credit per training session.

#### *Learning Objectives:*

1. How to inspect new envelope / insulation requirements under the 2018 and 2021 IECC code.
2. How multi-family residential testing differs from single-family homes testing.
3. Performance vs Prescriptive path differences.
4. The thermodynamics and building science related to the creation of these codes.
5. The best practices for Heating, Ventilation and Air Conditioning (HVAC) systems including mechanical ventilation options for the KC Metro area.
6. HERS and Energy Rating Index (ERI) scoring and their meaning.
7. How IECC codes are determined and the historical background.
8. Details on advanced framing techniques and how details like doors and windows may change when using insulated sheathing in the building shell.
9. Testing process for infiltration and ducts.
10. Reading reports and building plans that may be relevant to code inspectors.

#### *Course Outline*

##### **1) Introduction to the Energy Code:**

- a) History of how and when codes changed – added additional compliance path, IRC now referencing IECC instead of having a separate chapter, etc.
- b) Overview of the various compliance paths through the code – prescriptive, performance, and ERI.

##### **2) Envelope:**

- a) Thermal value changes and "envelope" definitions.
- b) Thermal value impacts on details like windows and doors.

- c) Rater insulation grading.
  - d) Advanced framing techniques and resilience.
- 3) **Systems:**
- a) Why tight ducts matter.
  - b) Mechanical ventilation best practices vs. code requirements, including what's in the IRC.
  - c) Lighting and appliance compliance paths for consideration.
  - d) Clean energy – i.e., electric vehicle and solar ready.
- 4) **Commercial green building standards:**
- a) Testing requirements for ENERGY STAR, LEED and other green building standards
- 5) **Bridging the gap between Building Officials and HERS Raters:**
- a) Testing requirements in the code and how they are performed.
  - b) The What and Why – demystifying HERS Raters process including the differences between HERS and Code Compliance Verification work including what reports Building Officials will receive.
  - c) What does a HERS Index Score mean; what is the difference between a "52" and a "60;" and how is different than the ERI?
  - d) How is multifamily housing rated by HERS Raters? What metro jurisdictions do what?
- 6) **What else is new in the 2021 IECC?**
- a) Differences between the 2021 IECC and 2018.
  - b) Overview of the what, how, and why.

## **Task 2 Deliver Training to Audiences**

Offeror will work with MEC and other stakeholders to schedule and market training sessions as necessary to meet the needs of the region's municipalities.

### *When*

Multiple trainings in 2022 and 2023. First target dates are April or May, 2022.

Subsequent dates to be determined in Kansas City, MO for 2022.

Further training to be scheduled as demand is determined.

### **Trainer Qualifications:**

A trainer for this course will need to have specialized experience and knowledge in the field of building performance and energy codes. The trainer will need to also have understanding on process and administrative conditions code inspectors are working under including the permit process.

A minimum of five years' experience in the field of building inspections, the HERS index and process, commercial energy code, and other sustainable construction techniques are required.

Additionally, the ideal trainer will have:

- CEU accreditation.

- Experience training large audiences of building performance.
- Familiarity and training experience with ENERGY STAR, LEED and other sustainable standards.
- Experience with reporting requirements under the energy code Performance Path.
- A basic knowledge of lighting and other appliance categorizations preferred.
- A thorough knowledge of building framing, insulation and how to mitigate thermal bridging.
- Comprehensive experience with mechanical ventilation and building automation systems.
- A basic knowledge of lighting and other appliance categorizations preferred.