

REQUEST FOR PROPOSALS

Contractor Training Services



Association of Monterey Bay Area Governments

A Voluntary Association of the Cities and Counties in the Tri-County

Monterey, San Benito and Santa Cruz

Monterey Bay Region

September 16, 2010

Association of Monterey Bay Area Governments
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One reproducible and three copies of consultant's proposal must be received by AMBAG no later than September 16, 2010, 5:00 PM Pacific Daylight Time.

**Association of Monterey Bay Area Governments
Request for Proposal for
Contractor Training Services**

I. BACKGROUND

Initially begun in 2006, the AMBAG Energy Watch program provides energy efficiency programs and training to residents, municipal jurisdictions and businesses in the AMBAG region. To support the AMBAG Energy Watch residential program, the developing PACE programs, the new residential incentive programs being released by investor owned utilities in the fall of 2010, the potential release of the federal Home Star program, and the goals of the California Energy Efficiency Strategic Plan developed by the California Public Utilities Commission, the Association of Monterey Bay Area Governments (AMBAG) seeks to provide BPI training and certification to local contractors in the AMBAG region.

The program will target a minimum of 30 contractors for development and training who are interested in pursuing a whole-house approach to home improvement. The goal is to recruit and train a group of contractors who can adapt to and successfully incorporate whole-house performance services to their existing business model in and around Monterey, Santa Cruz and San Benito counties. A limited number of contractors will be selected for each training segment through an application process.

The purpose of training is to place adequately trained, prepared, contractors in the field with an emphasis on their chance to succeed in the market place. The Association of Monterey Bay Area Governments desires to provide trainees with an opportunity to achieve BPI Building Analyst certification and one other certification appropriate for BPI accreditation at the end of the training program.

For a successful project, close communications and strong teamwork will be needed among all members of the delivery team: The Association of Monterey Bay Area Governments, the professional selected through this RFP process to conduct training (Trainer), field mentors, and quality assurance inspectors. Additional field mentors may be recruited from the existing pool of qualified Home Performance with Energy Star (HPwES) contractors.

II. PURPOSE OF RFP

The purpose of this RFP is to solicit the services of qualified and skilled Trainer(s) with experience in the existing home retrofit market to provide the following services.

1. Assist with the review of applications and selection of qualified contractors and/or residential energy professionals.
2. Provide curriculum content and testing protocols for possible modification for California climate and housing stock or propose alternate existing industry-standard curriculum and protocol appropriate for use in the California climate and housing stock consistent with BPI Building Analyst standards.

3. Deliver field and classroom training services to prepare participating contractors for BPI Building Analyst certification and/or additional certifications that may be deemed appropriate for participants in the program. Field technicians selected to provide mentoring and quality assurance inspections will also attend training to ensure consistency of message and practices between trainers, mentors, and quality assurance inspectors. The Trainer must demonstrate its qualifications to deliver BPI training and provide proctoring for all classroom and field testing protocols associated with the certification process.
4. Provide opportunity for existing qualified contractors to participate in written and field testing for BPI Building Analyst certification.

III. SERVICE EXPECTATIONS

This section outlines the general expectations for the work to be provided by the Trainer. Details of the scope of work will be developed as the contract is negotiated.

1. **Assistance with Contractor Trainee Selection.** In order to meet the goals of the program, the Trainer will work closely with the Association of Monterey Bay Area Governments to review contractor applications and to assist in the selection of qualified contractors to participate in training. The objective is to identify contractors who will have a strong likelihood of successfully converting to whole-house services.
2. **Curriculum and Testing Protocol(s) Review.** The Trainer will participate in a review, modification, or development of training curriculum in keeping with BPI standards. This review shall assess and make recommendations for modifications or replacement of the curriculum for the California climate and housing stock. A similar review shall be conducted on classroom and field testing protocols that will be used to assess contractor competency. Trainer shall be responsible for developing a training syllabus based on the selected material.
3. **Training Services.** The Trainer will deliver performance-based contractor training in conjunction with the Association of Monterey Bay Area Governments. The training will cover both the technical and business aspects that a successful home-performance contractor must master.

The training is anticipated to include approximately six to seven days of intensive classroom and field training, covering, at a minimum, the following topics:

- Program and home performance overview
- Building science fundamentals
- Utility bill analysis
- The audit process
- Technical aspects, including:
 - Solar effects
 - Thermal shell
 - Moisture control
 - HVAC systems
 - Healthy indoor air
 - Water heating
 - Lights and appliances

- Performance testing
- Contractor aspects
 - Tools and testing equipment
 - Field training and installation
 - Quality control
 - Marketing and sales, including financing and incentive options
 - Reporting requirements
 - Closing the deal
- Programmatic aspects
 - Field mentoring phase
 - QA procedures
- BPI Building Analyst curriculum, classroom, and field testing protocols
- Introduction to using a computerized energy audit tool (e.g., Weatherization Assistant or other DOE BESTEST-approved software).

4. **Testing Protocols.** Working closely with the Association of Monterey Bay Area Governments staff, the Trainer will implement classroom and field testing protocols that will assess the capabilities of participating contractors. This also includes classroom and field testing protocols to enable trainees to receive the BPI Building Analyst certification (and/or other certification that may be deemed appropriate). These assessments will be the formal hurdle that contractors must pass in order to be approved as certified contractors in the program.

5. **Teamwork.** For a successful project, close communications and strong teamwork will be needed among all members of the delivery team: the Association of Monterey Bay Area Governments, the Trainer, and field mentors.

IV. TASKS, DELIVERABLES, TIMELINE

Table 1 (below) outlines the anticipated steps, deliverables, and timelines for both the Trainer and AMBAG. The steps are intended to give a sense of the time frame program as a whole, including portions for which the Trainer is not responsible. The schedule is subject to change at the discretion of AMBAG based on program needs.

Table 1 Anticipated Step, Deliverables, Timelines, and Responsible Party.

Task	Proposed Subtask/Deliverable	Responsible Party	Estimated Completion Date
T1 Curriculum Development			
	Issue Trainer RFP	AMBAG	August 26, 2010
	Trainer Proposal Submitted	RFP Responders	September 16, 2010
	Select Trainer	AMBAG/Advisory Group	September 23, 2010
	Submit draft training plan/syllabus/assessment protocols	Trainer	October 21, 2010
	Review of draft above	AMBAG	October 28, 2010
	Draft 2 of training plan/syllabus/assessment protocols (if necessary)	Trainer	November 1, 2010
	Review of draft 2	AMBAG	November 4, 2010
	Final training plan/syllabus/assessment protocols	BPI (TBA)	November 8, 2010
T2 Training			
	Set up training logistics	AMBAG	mid-October, 2010
	Conduct classroom and field training for contractors and field technicians	Trainer	November 15 - 23, 2010
T3 Contractor Assessment			
	Assess participating contractors	AMBAG/Field Mentors ¹	end of June, 2011

¹ AMBAG anticipates that experienced home performance experts will work closely with each newly trained contractor during their first three on-site jobs (initial home performance assessment and final inspection if home improvement work is conducted) and provide review of required audit documentation and phone consultation for an additional two jobs. Depending on mentoring results, additional mentoring may be required on a case-by-case basis at the discretion of the program. Field mentors will provide support to the contractors while also assessing their skills (using the field evaluation forms and protocols developed by the program and reviewed for modification by the Trainer). The Trainer may propose to do all or part of the field mentoring task. This may be negotiated at the time of contract.

V. PROPOSAL CONTENTS

All proposals submitted in response to this RFP must include the following information:

1. a statement of understanding of service expectations;
2. statement of adequate staffing and capacity;
3. statement of appropriate insurance coverage including liability insurance, worker's compensation, and unemployment insurance;
4. qualifications and experience of primary trainers and key support staff (including qualifications to deliver BPI certification or similar certification), with particular attention paid to experience working in the existing home performance market and with trade contractors in the existing home market;
5. proposed compensation (include hourly rates if applicable);
6. proposed travel and lodging rates;
7. proposed curriculum texts and sources if other than existing program materials are proposed for use;
8. proposed coordination with or provision for mentoring and quality assurance staff;
9. references from clients who have received training services from respondent;
10. schedule availability; and
11. any other factors respondent deems appropriate for consideration based on respondents' professional experience.

VI. GENERAL INFORMATION

1. **Contact Person.** Questions regarding this proposal may be addressed to Elisabeth Russell @ erussell@ambag.org. Questions and responses will be made available to all respondents.
2. **Eligibility.** Proposals may be submitted by qualified individuals or organizations who can demonstrate the ability to provide the services described in this RFP. *Note that if the Professional proposes to include mentoring and field testing as part of the training proposal, AMBAG reserves the right to request that the Professional include on their training team a qualified professional from the local region. This is to ensure that local support for trainees is in place once the training program is fully completed. If mentoring and field testing is not included in the proposal, the proposal should include provisions for assisting coordinating review of mentoring and field testing evaluation procedures and qualifications of potential mentors.*
3. **Contract Period.** The contract or contracts awarded pursuant to this RFP (note that there might be contracts with more than one respondent) will be for the period commencing approximately September 23, 2010. An option to renew the contract for subsequent training programs as described above will be offered to successful respondents.

4. **Submission of Proposals.** The Trainer shall submit an electronic copy of its proposal and any additional attachments to erussell@ambag.org no later than 5:00 p.m. Thursday, September 16, 2010. Proposals must be received on or before this date. Proposals received after this deadline for any reason will be considered late and ineligible for consideration.
 - **Proposals must be submitted in pdf format with print capability enabled.**
 - **Proposals must be formatted to print on 8 1/2 x 11 paper.**
5. **Evaluation of Proposals.** All proposals will be reviewed by an evaluation committee convened by the Association of Monterey Bay Area Governments. At the option of the Association of Monterey Bay Area Governments, on-site formal interviews and/or telephone interviews may be conducted September 21 or 22, 2010.

The selection of the Trainer(s) under this RFP will be made in accordance with the stated evaluation criteria below, not necessarily at the lowest cost. Factors not specified in the proposal shall not be considered in determining the award and shall not be negotiated for inclusion in the contract.

Table 2 lists the criteria that will be used to evaluate both the written proposals and the interview sessions, if conducted. The rating scale shall be from 1 to 5, with 1 being a poor rating, 3 being an average rating and 5 being an outstanding rating.

The Project Manager will check references for the top-ranked individual or firm using the following criteria in Table 3. The evaluation rankings will be labeled Satisfactory/Unsatisfactory.

6. **Notification of Contract Award.** The successful candidate will be notified in writing on or about September 23, 2010.
7. **Reservation of Rights.** AMBAG reserves the right to reject any and all proposals received or to withdraw this offer at any time. AMBAG also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract(s).

Table 2 Evaluation Criteria for Written Proposals and Interview Sessions.

Weighting Factor	Qualification	Standard
2.0	Scope of proposal	Does the Trainer show an understanding of the project objective, methodology to be used, and results that are desired from the project?
2.0	Assigned personnel	Do the persons who will be working on the project have the necessary skills? Are sufficient people of the requisite skills assigned to the project?
1.0	Availability	Can the work be completed in the necessary time? Can the stated completion dates be met? Are other qualified personnel available to assist in meeting the project schedule if required? Is the project team available to attend meetings as required by the Scope of Work?
1.0	Motivation	Is the individual or firm interested and are they capable of doing the work in the required time frame?
2.0	Hourly rates	Do the proposed hourly rates compare favorably with the project manager's estimates?
2.0	Firm capability	Does the individual or firm have the requisite support capabilities for the assigned personnel? Has the individual or firm done previous projects of this type and scope?

Table 3 Evaluation Rankings.

Qualification	Standard
Overall performance	Would you hire this Trainer again? Did they show the skills required by this project?
Timetable	Was the original Scope of Work completed within the specified time? Were interim deadlines met in a timely manner?
Completeness	Was the Trainer responsive to client needs? Did the Trainer accurately anticipate problems? Were problems solved quickly and effectively?
Budget	Was the original Scope of Work completed within the project budget?
Job knowledge	Did the Trainer demonstrate the comprehensive skills and knowledge required to perform the Scope of Work? Was the Trainer able to accurately communicate knowledge to client?
Communication	Was the Trainer a good communicator? Did the Trainer communicate effectively in all necessary media (e.g., written, oral, electronic)?