



# IBPSA-USA X18

## Certification Outreach and Partnership Development

### Request for Proposals

March 10, 2025

#### **Overview:**

IBPSA-USA's Certification Committee has developed frameworks outlining certification processes for software tools, modelers, and model reviewers using building energy analysis for code compliance and beyond-code programs. The next phase for the committee will be to reach out to code bodies and authorities having jurisdiction (AHJs) to share the certification frameworks and seek feedback.

The committee seeks a contractor to lead the outreach and partnership development effort. The BEM Certification Frameworks (developed by the IBPSA-USA Certification Committee) will be presented to several AHJs via one-on-one meetings (or with multiple attendees from each organization, but not a broad-reaching webinar format) to collect feedback and generate interest in adopting the frameworks.

The total budget for this scope of work is \$16,400.

#### **Scope of Work:**

As part of this task, the sub-contractor will present the BEM certification frameworks to several AHJ's in one-on-one meetings to:

- Coordinate with AHJs to encourage them to rely on the IBPSA-USA "certified tools" portal as their list of approved software programs and to move away from referencing the IRS 179D list
- Gather feedback on the certification frameworks including technical details, usefulness to AHJs' programs, suggested revisions, and other feedback to make the certification frameworks as valuable to AHJs as possible.
- Discuss the potential to develop pilots for the certification programs

The contractor will also coordinate with other IBPSA-USA project initiatives that include AHJ outreach to minimize overlapping communications.

#### **Tasks**

- Task 0 – Project Management
  - Attend online meetings with the Project Execution Committee (PEC)
    - Kickoff

- AHJ presentation outline/ meeting agenda review
- Draft presentation review
- 50% progress check-in
- End of project debrief
- Task 1 – Identify AHJs, and develop meeting presentation materials
  - In consultation with the PEC, the contractor will develop meeting agendas, presentation materials, and interview questions for the meetings with AHJs
  - In consultation with the PEC, the contractor will identify at least 5 AHJs to meet with.
- Task 2 – AHJ meetings
  - Meet with the identified AHJs
  - Prepare detailed summaries of the meetings. Summaries should be focused on actionable feedback from the meetings.
  - Contractor will share meeting invitations with representative(s) from IBPSA-USA to allow attendance from Certification Committee leaders and/or IBPSA-USA's Executive Director.

**Deliverables and Timeline:**

Deliverable/Milestone	Date
0.1 Issue RFP	3/10/2025
0.2 Proposal Deadline	3/24/2025
0.3 Notice of Selection	3/28/2025
0.4 Project Kickoff	4/1/2025
0.5 Monthly Progress Reports	Monthly
X18: Outreach and Partnership Development – Draft Report	6/9/2025
X18: Outreach and Partnership Development – Final Report	6/23/2025

**Format for Submissions:**

1. CV and Team Expertise: Description of general qualifications, specific evidence of relevant experience, and a listing of key personnel that would be available to work on this project.



2. Cost: Proposed hourly billing rate for each team member. Also provide a proposed total budget for this project (not-to-exceed), and a description of any match funding or in-kind contributions that would be provided.
3. Description of Approach: Provide a description of the consultant's approach to meeting the project objectives (2 pages max). Consider including the following details:
  - a. Understanding of IBPSA-USA's Certification Frameworks  
(<https://ibpsa.us/resources/national-bem-certification-program/>)
  - b. List of AHJs that will be targeted for meetings, and description of any relationships with AHJs.
4. Comparable Projects: Summary of past projects that demonstrate the consultant's expertise.

**Evaluation of Submissions:**

IBPSA-USA will evaluate all submittals to determine which Consultants have the experience and qualifications that are best suited for this project.

IBPSA-USA may in the course of soliciting proposals:

- modify the timeline
- negotiate with one or more respondents to modify the proposed scope
- solicit contracts with one or more respondents for all or a portion of the work
- opt not to pursue any proposals at the current time

**Submission Schedule:**

Submit qualifications in PDF form via email to Hanif Smith, [executive.director@ibpsa.us](mailto:executive.director@ibpsa.us) , by 5:00pm Pacific time on 3/24/2025.