

5. SECTION B - SCOPE OF SERVICES

5.1 BACKGROUND:

5.1.1 Montgomery County has one of the most ambitious climate commitments in the nation—an 80% reduction in community greenhouse gas emissions by 2027 and 100% reduction by 2035. With half of our community-wide emissions generated by existing buildings, and average annual approval of new construction totaling over 8 million square feet, building codes are a powerful tool to steer the County to meet this goal. We will further develop County codes over the next three code cycles (9 years) resulting in Net Zero Energy and full electrification code.

Montgomery County's Codes & Standards initiatives aim to offer locally focused training, education, and tools to support codes and standards implementation, enforcement, and compliance activities, as well as development and implementation of reach codes and model ordinances.

Montgomery County's familiarity with its communities plays a key role in informing and delivering regionally relevant program offerings that may not otherwise be available.

Montgomery County Department of Permitting Services (DPS) has the authority to adopt, implement, and enforce building energy codes for Montgomery County, Maryland. DPS has been enforcing a version of the energy code since 2009 and a version of the green code since 2015. We issue, on average, 40,000 permits each year.

5.1.2 The contract resulting from this solicitation will utilize federal funds provided by a Department of Energy (DOE) grant, from the funding opportunity *Assistance for the Adoption of the Latest and Zero Building Energy Codes* (DE-FOA-0003056), as authorized in the Inflation Reduction Act of 2022. DOE must approve this contract prior to it being awarded, and all work must adhere to federal and local rules and reporting, financial, and other compliance requirements.

5.2 INTENT:

5.2.1 The federal funding available through the DOE grant enables Montgomery County Department of Permitting Services to further develop County codes, ultimately leading to the Net Zero Energy and Full Electrification Code adoption over the next two code cycles in 2029.

Explanation of Code Cycle: The International Code Council (ICC) usually publishes codes by March of the cycle year. The ICC cycle year is every three years, i.e., 2021, 2024, 2027, etc. The State of Maryland adopts new codes within 18 months after they are published by ICC. This does not always happen; the State of Maryland adopted the 2021 Codes approximately 27 months after ICC publication. The Maryland Authority Having Jurisdiction (AHJ) are required to adopt (and amend if desired) the state codes within 12 months of state adoption. Montgomery County adopted the 2021 codes in December of 2024. The code cycle for the 2024 codes is accelerated and the State of Maryland is expected to publish the 2024 codes in September 2025. As such, the 2021 code cycle will be shorter than 3 years. The 2021 code cycle in Montgomery County will run from December 2021 until approximately October 2026. The 2024 code cycle will run until 2029 when the 2027 codes should be adopted. When the codes are adopted, there is usually a few months before the codes begin being enforced.

DPS is issuing this Request for Proposals (RFP) seeking proposals from training or energy related entities (Contractors) to develop an Energy Codes and Standards Training and Education Program, for the upcoming 2024 and 2027 Montgomery County Energy Codes, with the following task:

- Develop a training curriculum and modules for energy codes and related permitting processes, as the basis for the Energy Codes and Standards Training and Education

Program. This program establishes and implements training and education for the building industry to support, understand, and effectively implement energy efficiency codes and standards. The videos will be uploaded to our County YouTube Channel by the County.

5.2.2 The purpose of this solicitation is to enter into a contract with one qualified firm for Education and Training, including but not limited to planning, developing and implementing education and training modules.

The County intends to award one contract for these services.

DPS anticipates allocating a maximum of approximately \$1.2 million dollars for the entire life of the contract.

When the wording Add On is listed, this indicates that we would like pricing on this item, but may not be utilized.

5.3 MONTGOMERY COUNTY ENERGY CODE CONTENT: The information provided here is for the Offeror to see and learn Montgomery County's current Energy codes and the permitting process.

5.3.1 Montgomery County Commercial and Residential Energy Codes:

1. The Commercial code is the Montgomery County Energy Code and the energy chapter of the Green Code, which are amended versions of ASHRAE 90.1 and IgCC.
2. Materials that may be helpful in understanding the Commercial code:
 - DPS Webinar slides for 2021 Code (provided upon request)
 - Notable amendments include adoption of:
 - PNNL-35193 Technical Brief:
https://www.pnnl.gov/main/publications/external/technical_reports/PNNL-35193.pdf
 - 90.1-2022 Appendix L (Total System Performance Ratio – TSPR).
3. The Residential code is the amended IECC Residential Provisions.
4. For reference, the current 2021 codes are in Executive Regulation 13-24. The 2024 codes are not yet finalized but will be very similar to the existing codes. The codes may change during the County Council approval process.
<https://www.montgomerycountymd.gov/DPS/Resources/Files/Green/MCER13-24.pdf>
5. Montgomery County permitting processes, regarding energy review and approval. Source materials include:
 - Commercial building documents located on the DPS website in Energy and Green Building: [Commercial Division Home Page - Department of Permitting Services - Montgomery County, Maryland](#)
 - Documents Required for Green Energy Plan Review
 - Townhouse and Residential Building Energy Policy Guideline
 - Energy Code Analysis Spreadsheet - Mandatory Requirements
 - 2021 IgCC Checklist
 - Commissioning and Final Energy Inspection Guidelines
 - Commissioning for Building Owners
 - Cx-FPT Compliance Checklist
 - Residential building documents located on the DPS website In Residential permits: [Residential Division Homepage- Department of Permitting Services - Montgomery County, Maryland](#)– design guidelines tab.
 - Plan submission Energy Requirements for SFDs and THs.
 - Incorporate changes to permitting processes as new software tools are developed.

5.4 SCOPE OF SERVICES

5.4.1 Training Content – 2024 Code Core Modules

5.4.1.1 The contractor shall lead all Training and Education Program implementation activities in coordination with the Montgomery County team. The contractor shall develop a training curriculum for the Code Content. The contractor shall be responsible for each activity listed below:

5.4.1.2 **Training and Education Program Design and Planning:** The Offeror shall lead the design and planning of a comprehensive training and education program aligned with Montgomery County's Energy Codes. The scope of work shall include:

1. Program Kickoff and Ongoing Coordination:

- a. Facilitate a kick-off meeting with DPS to align goals, timelines and expectations. Within 2 weeks of the Award.
- b. Schedule and lead regular bi-weekly progress meetings with DPS to present proposed instructional designs and incorporate feedback throughout the development process. After the development process, progress meetings can change to a minimum of once a month. Set the schedule within 1-2 weeks after the initial program kickoff meeting.

2. Situational Analysis, Delivery Strategy, and Implementation Plan:

- a. Conduct a situational analysis to assess training needs, learner profiles, and constraints. By the first regular bi-weekly progress meeting.
- b. Recommend and refine a delivery model (e.g., fully virtual, asynchronous e-learning) that ensures accessibility, scalability, and compliance with adult learning principles. By the first regular bi-weekly progress meeting, start recommendations. They can be ongoing throughout the entire process.

3. Performance Metrics and Evaluation:

- a. Add On: Identify and define measurable outcomes to evaluate training effectiveness (e.g. quiz scores, module completion rate, learner feedback, etc.). Provide ideas and different price points for evaluating training effectiveness in a basic format.
- b. Add On: At a minimum (per DOE requirements), develop and collect metrics that assess the workforce readiness of users. Provide ideas and different price points for collecting metrics.

4. Development Schedule and Module Review:

- a. Submit a detailed development schedule, within the first 1-2 months, for all training modules, with key milestones for DPS review and feedback.
 - Identified Core Modules listed below, hours of content are estimates only, final content will be determined in development meetings:
 - 2021 and 2024 Energy Code Amendment overview (2hrs content)
 - PNNL-35193 (2hrs content)
 - Commissioning (2.5hrs content)
 - 90.1 Section 11 (1hrs content)
 - TSPR (1.5hrs content)
 - Compliance Paths and code applicability (2.5hrs content)
 - Residential provisions IECC (5hrs content)
- b. All modules must be finalized and submitted to DPS for review no later than 30 calendar days prior to anticipated public release.

5. Dependencies and Final Approval:

- a. Acknowledge that the final content of the training modules is subject to the

Montgomery County Council's approval of the Energy Codes and may require revisions based on legislative changes.

- b. DPS must formally approve the training program design and Implementation Plan before a Notice to Proceed is issued.

6. Project Management:

- a. Designate a single point of contact (POC) who will serve as the primary liaison with DPS and be responsible for coordinating all communications, deliverables, and issue resolution. Identify the single POC to DPS during the Initial Program Kickoff Meeting.

5.4.1.3 Audience, Learning Objectives and Content Presentation: The audience for the training is the construction industry, including architects, engineers, designers, licensed residential builders, home building associations, alterations and maintenance contractors, and energy analysis professionals. Additional target audiences may include building officials, plan reviewers, and building inspectors.

1. Learning objectives:

- Users will be able to create building designs that comply with the energy codes.
- Users will have a basic understanding of the rationale for the energy codes per building type behind major topics.
- Where applicable, users will have access to and be able to use design guidance examples, for new construction and alterations, covering different building types including mixed use, office, and retail. Energy Code: Prescriptive and Performance Paths should be considered.
- Users will understand what documents and actions are required for permit submission and building final approval.

2. Teaching materials should focus on visualizations and dynamic explanations, avoiding text- heavy content and static slides. Slides should incorporate graphics and visuals or other mixed multimedia content and may include animations or interactive content.
3. Content should be broken into digestible modules which have clearly defined learning objectives.
4. Add On: Consideration should be given to including quizzes or other forms of student assessment and offering feedback on incorrect answers. Provide ideas with cost points on student assessments for the modules.

5.4.1.4 Module Format and Technical Characteristics

1. Training modules must have the following characteristics:

Must conform to requirements for posting on YouTube:

- Modules are recorded and available on-demand, for self-paced learning.

2. Training content should be organized as follows (if possible):

- a. Grouped and arranged in the same order as the Montgomery County Commercial and Residential Energy Base Codes (See 5.3.1).
- b. Changes between cycles.
- c. Montgomery County amendments, e.g. Appendix G, Section 11, TSPR.
- d. DPS specific processes as they pertain to permit submittals, this includes tools, supplementary documentation, and other compliance requirements.

3. Modules should have a table of contents that allows to directly jump to specific topics within each video Or similar feature.

- a. Modules should have a consistent format across modules.
- b. Modules must incorporate DPS/County branding and acknowledge federal funding from the Department of Energy.
- c. Modules should be professionally recorded with high quality audio.

- d. All materials must comply with Section **508 of the Americans with Disabilities Act (ADA) Requirements**. These requirements shall flow through to all subsequent modules and products. All content must be accessible to users with disabilities, including but not limited to:
 - Closed captioning for audio/video content and multimedia.
 - Alt-text for images.
 - Keyboard navigability.
- 4. All materials must comply with Department of Justice 28 CFR Part 35 Rule **Nondiscrimination on the Basis of Disability; Accessibility of Web Information and Services of State and Local Government Entities**. These requirements shall flow through to all subsequent modules and products. All content must be accessible to users with disabilities, including but not limited to:
 - a. Web accessibility.
 - b. Accessible PDFs and/or Word Documents.
 - All materials must comply with the Web Accessibility Policy Statement <https://www.montgomerycountymd.gov/mcg/accessibility.html>. These requirements shall flow through to all subsequent modules and products.

5.4.1.5 Continuing Education Credits

- Add On: Shall offer Continuing Education Credits (CEU). The contractor is responsible for ensuring all training developed is eligible for self-reporting Continuing Education Credits (CEU).

5.4.1.6 Course Questions and Feedback

- Develop content for survey that is offered at the end of each module.
- Provide recommendations, based on analysis of feedback, metrics and knowledge of the field, for improvements to the Training & Education Program and topics for potential new training sessions.

5.4.1.7 Training Launch and Deliverables

- Deliverables (modules, training materials, and other supporting documents/materials) will be the property of Montgomery County, delivered in a format that is editable, and which Montgomery County reserves the right to edit.

5.4.1.8 Add On: Marketing Services:

- DPS has or will create guidance documents. The marketing firm will take the guidance documents and create more user friendly, presentable documents. These would include but not limited too: technical guidelines, code compliance tools, outreach materials.
- Assist DPS create support materials, specific to energy code compliance.
- Assist in creating visualization of checklists or other forms of documents that are presentable and that will assist in energy code compliance.

i. **Training Content - 2024 Code Supplemental Modules**

1. The contractor must follow the same design requirements outlined in Section 5.4.1. In addition, the supplemental modules have the following additional requirements.
2. Develop additional modules beyond the set developed in the Training Content – 2024 Code task. Design should be incorporated into an Implementation Plan.
 1. The contractor should plan to develop the same number or more supplemental

modules as in the Training Content – 2024 Code task.

- a. Identified 2024 Code Supplemental Modules listed below, hours of content are estimates only, final content will be determined in development meetings:
 - 2024 specific code amendment changes (1hr content)
 - 2024 base energy code changes (2hrs content)
 - Other modules as needed (20hrs content)
 - Miscellaneous revisions based on DPS system changes and new tools (3 hrs content)
 - Residential provision IECC (5hrs content)
- b. Task may start before or after the Training Content – 2024 Code task modules are released.
2. Ideas for new supplemental modules may come from feedback from Outreach, reports from other components of the grant, new tools or processes that DPS adopts, etc. Example: Core module would be HVAC (Section 6), supplemental module is 6.5 Prescriptive Compliance Path – Economizers.
3. DPS approval of the design and planning is required for DPS to issue a Notice to Proceed
4. DPS reserves the right to identify the content of additional supplemental modules.

ii. Training Content – 2027 Code

1. The contractor must follow the same design requirements outlined in Section 5.4.1. In addition, the supplemental modules have the following additional requirements.
2. Final code version depends on the County Council approval process in which changes could occur. DPS approval of the design and planning is required for DPS to issue a Notice to Proceed.
3. Revise or replace the 2024 training modules (core and supplemental) to account for changes in the 2027 Montgomery County Energy and Green Codes. The 2027 code is expected to be based on ASHRAE 90.1 2025.
Identified 2027 Code Modules listed below, hours of content are estimates only, final content will be determined in development meetings:
 - 2027 Amendments (1hr content)
 - 2027 base energy code changes (2hr content)
 - Other modules as needed (20hrs content)
 - Miscellaneous revisions based on DPS system changes and new tools (3 hrs content)
 - Residential provisions IECC (5 hrs content)
4. Revise the training modules to account for any changes in the Montgomery County permit submission process, regarding energy review and approval.

b. Contractor's Qualifications

- i. The Primary Contractor must have specialized experience and knowledge in the field of building performance and energy codes, preferably ASHRAE 90.1 and IECC Residential. Familiarity with permitting processes is desired.
- ii. A minimum of five (5) years' experience in education, training and curriculum design within the field of commercial and residential energy codes and other sustainable construction techniques are required.
- iii. Experience training all levels of design professionals in the construction industry.
- iv. Experience with reporting requirements such as energy models, COMCheck, TSPR reports,

etc. associated with both performance and prescriptive paths.

- v. A thorough knowledge of building envelope performance and how to mitigate thermal bridging.
- vi. Comprehensive experience with HVAC systems and building automation systems.

c. Contractor's Responsibility

- i. Contractor must assist DPS staff with developing training materials, training knowledge and expertise on conducting training virtually to educate the public on the Energy Codes in accordance with the code cycles. Please see estimated timeline below. The contractor and all subcontractors must fulfill the requirements set forth in our Scope of services above.
- ii. Contractor must maintain qualified and knowledgeable personnel to work closely with DPS, users, and the public on all training development and activities for the duration of the entire contract.
- iii. The contractor may be required to reassign or replace personnel as work disciplines change, levels of required experience vary, or as work assignments are added or completed. The same level of experience/quality of the replaced personnel is essential. We reserve the right to review resumes and approve replacement.
- iv. The contractor must provide all labor and materials to support the County in technical assistance for education programs, and areas related to the planning and implementation of Montgomery County Energy Code Training.
- v. The contractor and subcontractors must have a consistent designated point of contact (POC) at each meeting.

d. County's Responsibilities/Method of Ordering Work

- i. Contract Administration/Management: The County will designate key personnel to administer the Contract resulting from this solicitation and manage the work issued under the contract. Key personnel will be identified in Section G, Contract Administration.
 - 1. The Contract Administrator and the Project/Task Order Manager will have the authorities as defined in paragraph 6 of the General Conditions of Contract Between County and Contractor, Section J.
 - 2. The County will give prompt written notice, within 3 business days, to the Contractor if the County observes or otherwise becomes aware of any fault or defect in services being provided or for nonconformance with the County's contracted requirements.
 - 3. The County will also take the lead role in the following:
 - a. Meeting internal County procurement and other administrative requirements.
 - b. Providing timely feedback to the Contractor regarding the completeness and quality of work delivered.
 - c. As time and need require, developing standard reports needed to address aspects of the Contractor's work.

e. Reports/Deliverables (Schedule)

i. Schedule

- 1. The initial contract delivery dates are on an aggressive schedule. The desired schedule is to have the modules available to the public when the 2024 Montgomery County Energy Code (2024 Code) is adopted, which is expected to be around 12/1/26.

The 2027 Montgomery County Energy Code (2027 Code) is anticipated to be adopted 3 years after the 2024 Code adoption.

Anticipated Timeframes for Tasks

Code Cycle	Task	Anticipated Task Start and Duration
2024	Training Content – 2024 Code	contract start to 2024 Code adoption
	Training Content - 2024 Code Supplemental	2024 Code adoption plus 12 months
2027	Training Content – 2027 Code	starting 1 year prior to 2027 Code adoption, ending at 2027 Code adoption
	Training Program Operation	2024 Code adoption through 2027 Code adoption plus 3 years

2. Deliverables for All Tasks of the Project:
 - Provide monthly and quarterly status reports.
 - Provide meeting agendas and status updates.
 - Provide metrics for performance evaluation used to improve program.
 - Provide a minimum of two design options for DPS to comment and provide feedback to determine final design.
3. Training Content 2024 Code deliverables:
 - Training & Education Program Implementation Plan that includes situation analysis, timeframe/schedule, roles and responsibilities, and proposed curriculum.
 - Training modules and supporting materials in English.
4. Training Program Operation Deliverables
 - Usage metrics and user data, performance metrics and learning evaluation tools, , feedback surveys
 - Develop program-specific content and edits or updates to content for Montgomery County regulatory filings.
5. Training Content - 2024 Code Supplemental Modules Deliverables
 - Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum.
 - Training modules and supporting materials in English.
 - See 2024 Code deliverables
6. Training Content – 2027 Code
 - Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum.
 - Training modules and supporting materials in English.
 - See 2024 Code deliverables

2. SECTION C - PERFORMANCE PERIOD

6.1. TERM