

# Request for Proposal: Attachments Energy Rating Council Simulation Trainer

April 25, 2018

## Section 1: Proposal Information

### 1.1 Purpose

The purpose of the request for proposal is to identify a trainer to develop the Attachments Energy Rating Council's (AERC) simulator training curriculum and serve as an AERC trainer on an on-going basis.

### 1.2 Designated Contact

The designated contact for this RFP is:

Erika Burns  
D+R International  
1100 Wayne Ave, Suite 700  
Silver Spring, MD 20910  
[eburns@drintl.com](mailto:eburns@drintl.com)  
301-628-2038

Alternate contact:

Emily Phan-Gruber  
[epgruber@drintl.com](mailto:epgruber@drintl.com)  
301-628-2017

### 1.3 Timeline

Activity	Anticipated Date
RFP Released	April 25, 2018
Questions Due	May 9, 2018
Responses to Questions Released	May 18, 2018
Proposals Due	June 1, 2018
Anticipated Award Date	June 29, 2018
Anticipated Start Date	July 20, 2018

\*AERC reserves the right to modify this schedule at its discretion. Any changes to the schedule or RFP clarifications will be posted on the AERC website: [aercnet.org](http://aercnet.org).

### 1.4 Questions

Questions must be submitted via email to the designated point of contact (Erika Burns) and alternate contact (Emily Phan-Gruber) by 11:59 pm on May 9, 2018. Questions received after the deadline are not

guaranteed to receive a response. Responses to questions will be distributed to questions submitters and those who have submitted an intent to bid by the question response deadline.

### 1.5 Proposal Submittal Deadline

Proposals must be submitted via email to the designated point of contact (Erika Burns) and alternate contact (Emily Phan-Gruber) by 11:59 pm on June 1, 2018. AERC reserves the right not to consider proposals received after the deadline. Proposals must be complete upon submission. AERC reserves the right not to consider changes and additions after submission.

### 1.6 Proposal Preparation Cost

Costs incurred in the preparation of this proposal in response to the RFP are the sole responsibility of the bidder.

### 1.7 Anticipated Contract Term

AERC would anticipate signing a contract for developing the training and a separate contract for serving as the trainer once the training curriculum is developed.

### 1.8 Anticipated Contract Amount

Bidders should propose the budget they believe is adequate to carry out the work proposed. The cost of the training and the trainers fee will be mutually developed with the trainer as the training curriculum is developed.

### 1.9 Award Notification

AERC will notify the selected awardee by email. AERC reserves the right to negotiate final terms and conditions with the winning bidder. If terms and conditions cannot be agreed upon then AERC reserves the right to reject the winning bidder and select an alternate.

## Section 2: Background Information

### 2.1 AERC Background

The Attachments Energy Rating Council (AERC) is an independent, public interest, non-profit organization whose mission is to rate, label, and certify the energy performance of window attachments such as blinds, shades, and storm windows. AERC serves the public interest by providing accurate and credible information about the energy performance of window attachments, which will help consumers, including homeowners, architects, and building owners, make informed decisions about window attachment products.

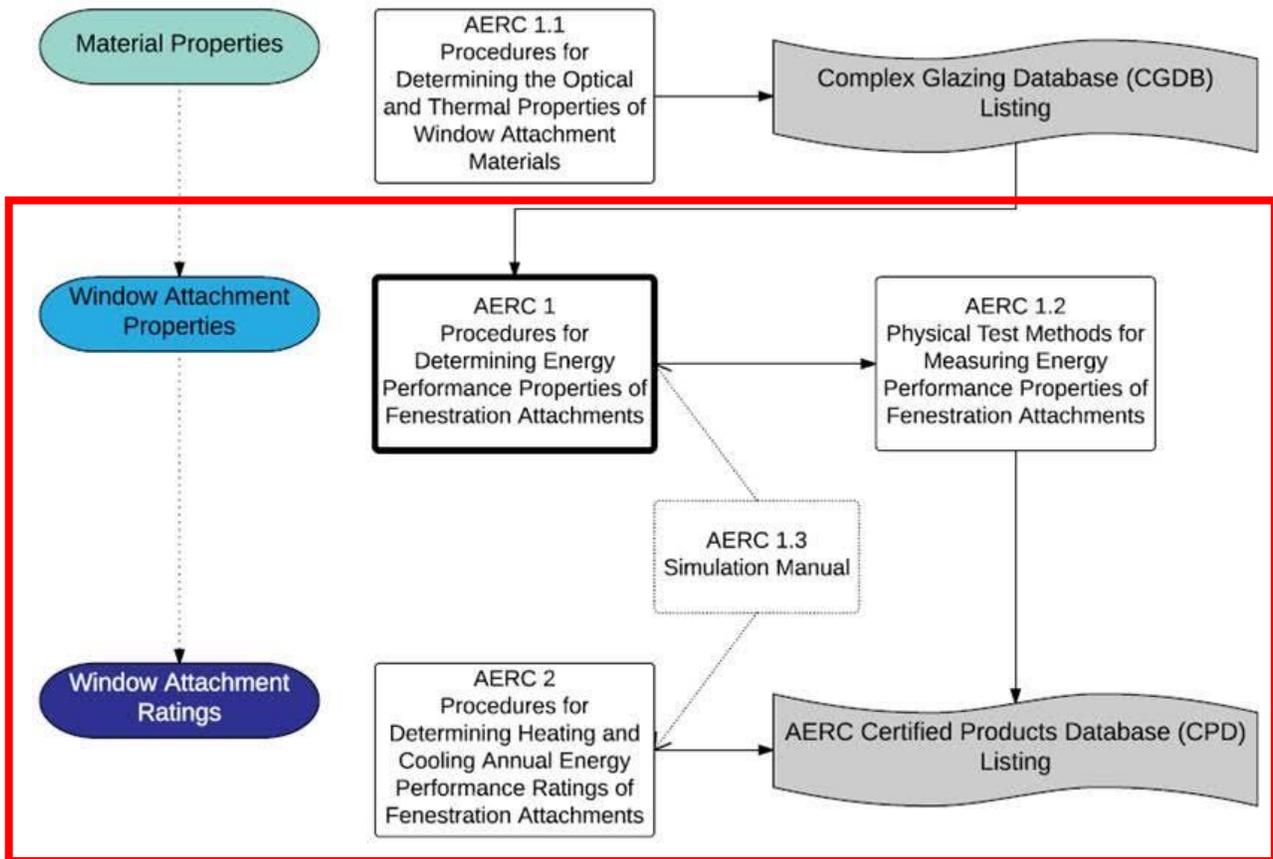
The AERC is comprised of a diverse group of window attachment manufacturers, component manufacturers, public interest organizations, and utilities who are working together to deliver a successful energy rating program for the window attachment industry.

### 2.2 AERC Technical Program

AERC's program is based on three levels of assessing product performance. The first layer is assessing the properties of substrates or the fabric, wood, glazing etc. material used in the construction of an attachment product (material properties). The second level is assessing the performance properties of a full attachment product (window attachment properties), and the final layer is assessing the comprehensive energy performance of that window attachment in a home (window attachment

ratings). Figure 1 outlines the layers, standards associated with each, and details about where that performance information is stored.

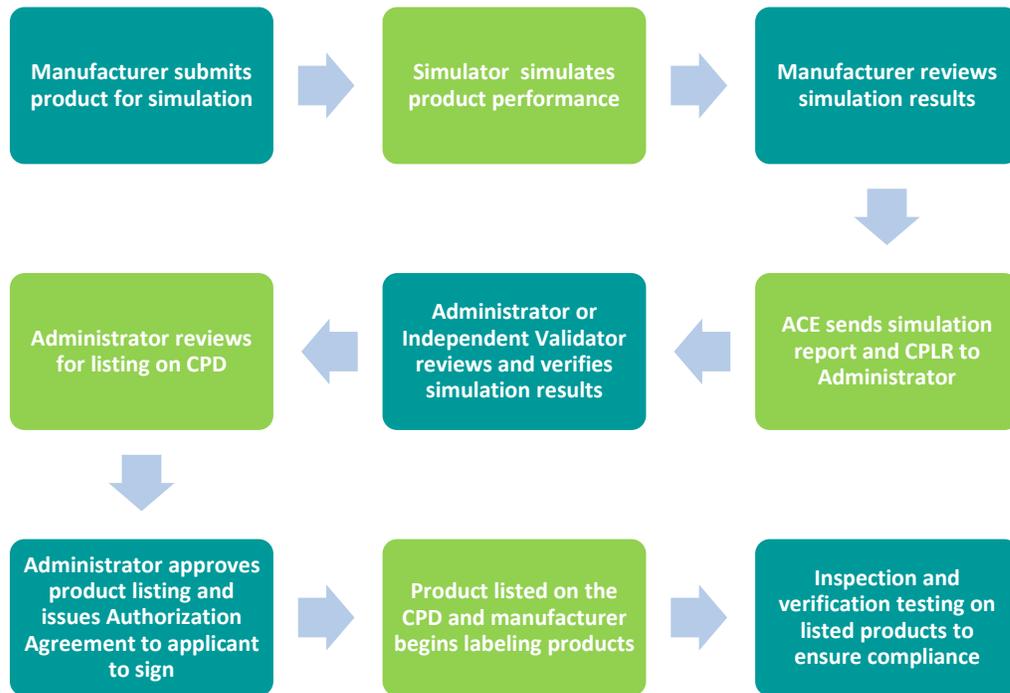
**Figure 1: Technical Standards Flow**



## 2.2 AERC Certification Program

AERC has launched the certification program for Phase 1 residential window attachments. The certification process is outlined in Figure 1. Product categories included in Phase 1 of the program launch are: storm windows, cellular shades, roller shades, pleated shades, blinds, and solar screens. Additional product categories will be added in subsequent phases of the program.

**Figure 2: Product Certification Process**



### 2.3 Key Program Roles

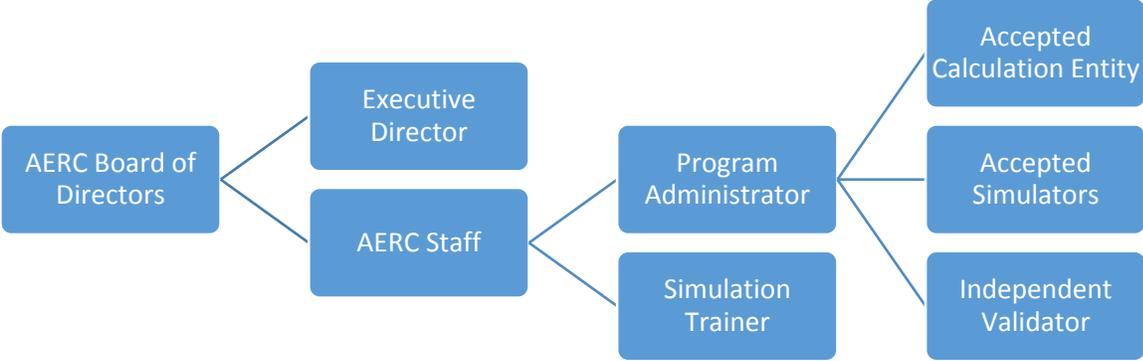
Table 1 and Figure 3 outline the key program roles to better help bidders understand the structure of the program.

**Table 1: Program Roles and Responsibilities**

Role	Description
AERC Board of Directors	Responsible for organizational oversight and development.
AERC Executive Director	Responsible for high level planning and management of the organization.
AERC Staff	Responsible for day-to-day management and coordination of organization activities, including committee work, member relations, and coordinating with the Program Administrator.
Program Administrator	Responsible for implementation of the AERC Certification Program.
Simulation Trainer	Responsible for developing and maintaining training curriculum for ACEs and Simulators.
Independent Validator	Responsible for reviewing and confirming that simulations were conducted correctly relative to program requirements.
Accepted Calculation Entity (ACE)	Legal responsibility for conducting simulation, modeling, and verification services to manufacturers and overseeing the activities of simulators.
Simulator	Perform simulation and calculation services under the direct supervision of an ACE in evaluating product configurations seeking

	qualification under the program requirements using AERC approved tools, protocols, and requirements.
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**Figure 3: Organizational Certification Program Structure**



**2.4 Training Need**

The AERC program requires a sufficiently large group of highly trained simulators well-versed in the relevant AERC program software and policies and procedures. Central to that mission is having a highly qualified person who can develop and maintain a robust and comprehensive training curriculum for simulators, in addition to carrying out trainings on an on-going basis for accepted or prospective simulators.

For its certification program, AERC relies on LBNL-developed software programs [WINDOW](#), [THERM](#) and the recently-developed [AERCalc](#) for simulation purposes. The trainer will be expected to have detailed knowledge and understanding of these software tools and have prior experience using them, including using them to simulate window attachments over the window. In addition, the trainer will be expected to teach others to use these tools in compliance and to meet the simulation requirements laid out in AERC standards. The trainer would be responsible for covering materials inside the red box in Figure 1, but will need to have working familiarity with requirements and processes related to material properties as well and will need to also train simulators on submitting shading layers to the Complex Glazing Database Shading Layer library.

At this time, AERC expects that this role can be fulfilled by one person with the understanding that this may evolve as the program expands.

AERC anticipates that accepted Simulators and ACEs will be required to go through AERC-sponsored trainings on an annual basis or as directed. In addition, prospective simulators and ACEs will be required to participate and pass the training prior to completing their enrollment in the program.

The trainer is permitted to participate as a simulator in the AERC program. The trainer will be asked to develop a simulator evaluation exercise, but evaluation of simulators on an on-going basis will continue to be conducted by the Program Administrator.

## 2.5 Additional Sources of Information

Title	Location
AERC Website	<a href="http://aercnet.org/">http://aercnet.org/</a>
LBNL AERC Training Materials	<ul style="list-style-type: none"><li>• <a href="https://windows.lbl.gov/tools/aercalc/documentation">https://windows.lbl.gov/tools/aercalc/documentation</a></li><li>• <a href="https://windows.lbl.gov/aerc-lbnl-software-training">https://windows.lbl.gov/aerc-lbnl-software-training</a></li></ul>

## Section 3: Scope of Work

### 3.1 Overview and Objectives

AERC seeks a qualified bidder to provide a cost-effective development of a robust and comprehensive training curriculum for prospective and accepted AERC ACEs and simulators with the intention that the curriculum designer would subsequently lead the trainings.

### 3.2 Capabilities

AERC is seeking a trainer who can:

- Educate and train prospective and accepted AERC ACEs and simulators about:
  - Relevant AERC technical and certification standards including AERC 1, AERC 2, and AERC 400 as applicable to the simulation and submittal process
  - Simulating window attachment product performance according to AERC program requirements using AERC approved tools including WINDOW, THERM and AERCalc according to AERC 1.3
  - The requirements for submitting simulation packages to the Program Administrator for acceptance into the program
- Develop exams to assess simulator and ACE proficiency in meeting AERC program requirements on an on-going basis in conjunction with the Program Administrator
- Work with LBNL, AERC staff and the Program Administrator to coordinate updates to the AERC Simulation Manual
- Develop and maintain a clear and well-organized training curriculum
- Be an effective and well-received trainer
- Work collaboratively with a wide variety of stakeholders including AERC staff, the Program Administrator (Intertek), and LBNL

AERC is seeking trainers with the following attributes:

- Experience working as a certified simulator for the National Fenestration Rating Council, Passivehaus or similar programs
- Deep familiarity and experience working with THERM, WINDOW, RESFEN and COMFEN, and baseline familiarity with AERCalc
- Experience developing and leading trainings of complex and technical subjects
- BS or MS in an engineering, physics or science related discipline preferred

### 3.3 Tasks

This contract will be broken out across three tasks. Bidders are expected to outline how they will perform the following tasks:

### **Task 1: Curriculum Development**

The process for developing the curriculum, as well as developing content for the curriculum itself, including training and evaluation exercises.

### **Task 2: Curriculum Delivery**

Method and proposed plan for delivering the curriculum on an on-going basis to prospective and accepted ACEs and simulators.

### **Task 3: Curriculum Maintenance**

Proposed plan for maintaining the training curriculum on an on-going basis to ensure it remains up-to-date with software developments and changes to program requirements.

The winning bidder will be expected to work closely with AERC staff, Intertek, who is responsible for developing the certification program, and Lawrence Berkeley National Laboratory in the development, delivery, and maintenance of the curriculum.

## Section 4: Responsibilities and Requirements

### 4.1 Contractor Responsibilities

The winning bidder will be responsible for adhering to the following requirements:

- Project Personnel – The winning bidder may not re-deploy or replace any of the Key Personnel without the prior written consent of AERC.
- Communication – The winning bidder must inform AERC immediately upon gaining understanding that a deadline will not be met or the work is anticipated to exceed the contract ceiling in writing to the assigned AERC point of contact.

### 4.2 AERC Responsibilities

AERC will oversee and approve all work undertaken by the winning bidder:

- Providing project oversight and management
- Providing guidance, introduction and coordination with relevant program activities
- Reviewing, commenting on, and approving all deliverables

## Section 5: Proposal Requirements

### 5.1 Submittal Requirements

Proposals must be emailed to [eburns@drintl.com](mailto:eburns@drintl.com) and [epgruber@drintl.com](mailto:epgruber@drintl.com) by 11:59 pm on June 1, 2018. Proposals must include:

- Combined PDF of all required sections
- Word document of all sections with the exception of the cost proposal
- Excel worksheet of the cost proposal

AERC reserves the right to reject any proposal that does not meet these requirements.

### 5.2 Format Requirements

The proposal must be:

- Typewritten using a standard font (11 or 12 point)
- Each page must include the page number and the name of the bidder

- Each page must have margins between 0.75 and 1 inch
- Within the prescribed section page limits specified in Section 5.3

## 5.3 Content and Organizational Requirements

The full proposal will include the following in the designated format:

### 1. Proposal Cover Sheet Form

- Include a completed, signed Proposal Cover Sheet Form, which is provided in Attachment A.

### 2. Letter of Transmittal / Letters of Commitment

- Include a brief Letter of Transmittal, on company letterhead, signed by an appropriate officer of the lead bidder who can bind the company to a contract.

### 3. Table of Contents

### 4. Introduction (1 page maximum)

- Provide a brief description of the proposed trainer, his or her skills and qualifications, and a high-level overview of the proposed training plan, delivery and maintenance.

### 5. Statement of Work (8 pages maximum)

- Provide a high-level overview of the proposed approach.
- Describe the approach for each of the designated tasks: curriculum development, delivery, and maintenance. The response should address the following questions:
  - What would be your proposed approach for developing the curriculum?
    - How would you work with program staff and the Program Administrator during this development period?
  - What would be the major components of the curriculum?
    - Include a draft outline of the proposed curriculum.
  - What is your approach to training? What elements are the hallmarks of a successful training of this nature?
  - Through what mechanisms would you propose the trainings be carried out (electronically, in-person, etc.)?
  - After the curriculum is developed, how would you propose to maintain the curriculum on an on-going basis?
- Describe any anticipated challenges with this project and how you would propose to overcome them.
- Include a chart of tasks and deliverables with accompanying roles and responsibilities and estimated timelines for completing each task.

### 6. Budget/Cost Proposal (6 pages maximum)

- Financial capability— Disclose and provide details regarding any bankruptcy petition (whether voluntary or involuntary), receivership, insolvency event, or similar adverse financial circumstance suffered or incurred by bidder (or any predecessor entity) within the three years preceding the date of submission of this proposal. Disclose and provide details regarding any litigation, arbitration, or administrative proceedings involving bidder within the three years preceding the date of submission of this proposal in which the amount

claimed or adjudged against bidder exceeded \$25,000. Provide recent financial statements if available.

- b. Cost Form: Provide a completed Project Proposal Cost Form (Attachment B) detailing a Not-to-Exceed, Time-and-Materials budget broken out by task. Include a breakout of costs, including: labor hours, hourly rates and costs for the trainer; other direct costs; and total costs. All related expenses must be included and itemized on this form; any costs not included on this form will be disallowed. Include any assumptions that were used in the creation of this budget.

**7. Appendices**

- a. Appendix A: References
  - i. The bidder must provide at least 3 references. For each reference please include contact names, email address and telephone number, along with a brief description of the work conducted for that reference.
- b. Appendix B: Resume
  - i. Provide resume of the proposed trainer.
- c. Appendix C: Example work (optional)
  - i. The bidder can provide example presentations or links to videos or other multi-media to demonstrate prior work developing or conducting trainings.

**Section 6: Evaluation Criteria**

Proposals received by the deadline and that meet the RFP requirements will be reviewed by the proposal team. During the evaluation process, AERC reserves the right to consult references about the performance of the bidder, schedule interviews or presentations with the bidder, or request additional information or supporting material.

**Section 6.1 Evaluation Criteria**

In evaluating proposals, the proposal review team will use the following criteria:

Category	Maximum Points
Statement of Work	40
Personnel	40
Project Cost/Budget	15
Overall Presentation	5
<b>Total</b>	<b>100</b>

Reviewers will evaluate the proposal based on the following questions, among others:

**1. Statement of Work**

- a. Does the Statement of Work present a comprehensive, sound approach for accomplishing the requirements of this RFP?
- b. Is the Statement of Work thorough, specific and responsive to the requirements and details specified in the RFP?
- c. Does the proposal demonstrate a clear understanding of AERC’s expectations for this project?
- d. Does the Statement of Work reflect best practices in training development and delivery?

**2. Trainer Qualifications**

- a. How qualified is the proposed trainer in terms of skills, expertise and experience relevant to this particular effort?

**3. Project Budget/Cost**

- a. How does the total bid compare to other comparable proposals?
- b. Is the proposed budget consistent with the proposed Statement of Work?

**4. Overall Presentation**

- a. What is the overall quality of the proposal submission, including but not limited to: completeness, clarity, attention to detail, adherence to instructions and requirements and lack of errors?
- b. Does the proposal reflect and respond to the specific attributes of the project and AERC's overall needs?

**6.2 Award**

The winning bidder will be notified of the contract award decision by email. The anticipated award date is June 29, 2018. AERC will be the sole owner of the training curriculum.