# **RFQ-24-401**

# **Energy Code Development Support**

**Addendum 1**

**September 25, 2024**

The purpose of this addendum is to notify potential applicants of changes that have been made to RFQ-24-401.

The addendum includes the following revisions to the Solicitation Manual and Standard Agreement Example (Attachment 6). Added language appears in **bold underline**, and deleted language appears in [~~strikethrough~~] and within square brackets.

**Solicitation Manual**

1. Page 5, Section I under “Background Summary”added:

**In addition, the CEC estimates that homes built in accordance with the latest 2022 Energy Code are, on average, at least fifty-two percent (52%) more efficient than those built under national model codes (i.e., International Energy Conservation Code 2021). This demonstrates the success of California’s Building Energy Efficiency Standards, which have made a monumental cumulative impact over the past forty (40) plus years. However, these projections assume that the regulations are properly reflected in energy calculations and modeling, design drawings, construction, and verified by building departments. If any of these steps are inaccurate, incomplete, or bypassed, it could result in noncompliance with the Energy Code and unrealized potential energy savings to the State. To mitigate these potential losses in energy and emissions savings, and to reduce transaction and labor costs for building departments and field professionals, the CEC administers a robust Energy Code compliance program.**

**This program develops, updates, and maintains the California Energy Code compliance documents and associated data registries, and helps to ensure buildings are designed, constructed, inspected, and tested to meet the requirements of the Energy Code. The Energy Code compliance program also provides resources to Authorities Having Jurisdiction (AHJs) or building departments and oversees residential and nonresidential field verification and diagnostic testing programs.**

1. Page 5, Section I under “Purpose of this RFQ”updated:
* Developing, updating, and maintaining the California Energy Code for residential and nonresidential buildings; [~~and~~]
* Developing, updating, and maintaining the California Energy Code reference compliance software, CBECC and CBECC-Res[~~.~~]**; and**
* **Developing, updating, and maintaining the California Energy Code compliance data infrastructure, compliance documents, and other supporting documentation that aids the Energy Code compliance program.**

Work will focus primarily on the development**,** [~~and~~] implementation**, and compliance support for** [~~of~~] the 2025 and 2028 Energy Codes but will also support maintenance and enhancements to the 2022 Energy Code and will support preliminary work on future Energy Codes (2031 and beyond).

1. Pages 6-7, Section I under “Available Funding”updated:

There is a maximum of up to [~~$9,750,000~~] **$10,550,000** available to fund the three (3) year contract resulting from this RFQ. This is an hourly rate plus cost reimbursement contract with a ceiling on the total contract amount.

Funding for this Agreement will be subject to the availability of funds in the Fiscal Year (FY) 2024-2025, FY 2025-2026, and FY 2026-2027 Budget Acts.

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| **FISCAL YEAR** | **AMOUNT** |
| 2024-2025 | $3,250,000 |
| 2025-2026 | [~~$3,250,000~~] **$3,650,000** |
| 2026-2027 | [~~$3,250,000~~] **$3,650,000** |

Funding for the Agreement is from Energy Resources Programs Account (ERPA) and Cost of Implementation Account (COIA) funds. ERPA funds include $2,000,000 from FY 2024-2025; $2,000,000 from FY 2025-2026; and $2,000,000 from FY 2026-2027. COIA funds include $1,250,000 from FY 2024-2025; [~~$1,250,000~~] **$1,650,000** from FY 2025-2026; and [~~$1,250,000~~] **$1,650,000** from FY 2026-2027.

1. Pages 10-11, Section I under “Reference Documents”added:
* [**2022 Energy Code Residential Forms**](https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-2) **located at (https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-2).**
* [**2022 Energy Code Low-rise Multifamily Forms**](https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-3) **located at (https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-3).**
* [**2022 Energy Code Nonresidential Forms**](https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-4) **located at (https://www.energy.ca.gov/programs-and-topics/programs/building-energy-efficiency-standards/2022-building-energy-efficiency-4).**
* [**2022 Energy Code Single-family Residential Compliance Manual**](https://www.energy.ca.gov/publications/2022/2022-single-family-residential-compliance-manual-2022-building-energy-efficiency) **located at (https://www.energy.ca.gov/publications/2022/2022-single-family-residential-compliance-manual-2022-building-energy-efficiency).**
* [**2022 Energy Code Nonresidential and Multifamily Compliance Manual**](https://www.energy.ca.gov/publications/2022/2022-nonresidential-and-multifamily-compliance-manual-2022-building-energy) **located at (https://www.energy.ca.gov/publications/2022/2022-nonresidential-and-multifamily-compliance-manual-2022-building-energy).**
* [**Acceptance Test Technician Certification Provider Program website**](https://www.energy.ca.gov/programs-and-topics/programs/acceptance-test-technician-certification-provider-program) **located at (https://www.energy.ca.gov/programs-and-topics/programs/acceptance-test-technician-certification-provider-program).**
* [**Home Energy Rating System Program website**](https://www.energy.ca.gov/programs-and-topics/programs/home-energy-rating-system-hers-program) **located at (https://www.energy.ca.gov/programs-and-topics/programs/home-energy-rating-system-hers-program).**
1. Page 12, Section II under “Purpose”updated:
* Developing, updating, and maintaining the California Energy Code for residential and nonresidential buildings; [~~and~~]
* Developing, updating, and maintaining the California Energy Code reference compliance software, CBECC and CBECC-Res[~~.~~]**; and**
* **Developing, updating, and maintaining the California Energy Code compliance data infrastructure, compliance documents, and other supporting documentation that aids the Energy Code compliance program.**

Work will focus primarily on the development**,** [~~and~~] implementation**, and compliance support for** [~~of~~] the 2025 and 2028 Energy Codes but will also support maintenance and enhancements to the 2022 Energy Code and will support preliminary work on future Energy Codes (2031 and beyond).

1. Page 12, Section II under “Acronyms/Glossary”added:

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| **AHJ** | **Authorities Having Jurisdiction** |

1. Page 13, Section II under “Acronyms/Glossary”added:

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| **DRRM** | **Data Registry Requirements Manual** |

1. Page 13, Section II under “Acronyms/Glossary”added:

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| **FV&DT** | **Field Verification & Diagnostic Testing** |

1. Page 13, Section II under “Acronyms/Glossary”added:

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| **HERS** | **Home Energy Rating System** |

1. Page 14, Section II under “Acronyms/Glossary”added:

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| **Nonresidential Compliance Manual** | **The Nonresidential Compliance Manual developed by the CEC, under PRC, section 25402.1(e), to aid designers, builders, and contractors in meeting the energy efficiency requirements for nonresidential buildings.** |

1. Page 14, Section II under “Acronyms/Glossary”added:

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| **Residential Compliance Manual** | **The Residential Compliance Manual developed by the CEC, under PRC, section 25402.1(e), to aid designers, builders, and contractors in meeting the energy efficiency requirements for residential buildings.** |

1. Page 15, Section II under “Incidental Services”updated:

Technical Tasks 2[~~-6~~] **through 7** provide more detailed task activities for these areas:

1. Page 16, Section II under “Primary Tasks”added and updated:

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| **6** | **Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support** |
| [~~6~~] **7** | Contingencies |

1. Page 18, Section II under “Subtask 1.2: Program Meetings and Briefings”updated:

The goal of this subtask is to ensure direct collaboration with CEC staff, staff of other public agencies, and participating external stakeholders throughout the completion of Tasks 2 through [~~6~~] **7**, and to disseminate information to all parties as needed.

1. Page 19, Section II under “Subtask 1.5: Management of WAs”updated:

The goal of this subtask is to develop and manage all technical and budgetary aspects of WAs in accordance with the requirements of this Agreement for work to be performed under Technical Tasks 2 through [~~6~~] **7**.

1. Pages 28-29, Section II under “Primary Tasks”added:

**Task 6: Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support**

**The goal of this task is to provide technical support for developing, updating, and maintaining the California Energy Code compliance program. This includes updating data infrastructure, compliance documents (also known as “forms”), and other supporting documentation that aids the Energy Code compliance program.**

**This may include updating data dictionaries and other necessary data infrastructure to facilitate information exchange with Energy Code compliance software and data registries, and support services such as technical analysis and studies/reports, to enhance CEC’s oversight of Field Verification & Diagnostic Testing (FV&DT).**

**This task will involve updating Energy Code compliance documents and their related technical specifications, the current data registry technical and functional specifications, existing data exchange schemas, and other methods used to communicate Energy Code-related building energy performance, including performing technical analysis to support CEC decisions related to the Home Energy Rating and Labeling program. The work in this task is expected to include, but not be limited to, the following:**

* **Updating and improving Energy Code compliance forms.**
* **Enhancing the data dictionary.**
* **Updating the compliance document XML template infrastructure that is specified in the Energy Code.**
* **Reviewing and analyzing the results of CEC surveys of compliance documents.**
* **Updating the data registry requirements, as needed.**
* **Maintaining the accessibility and functionality of the Report Generator software service(s).**
* **Providing technical support to third parties involved in the Energy Code compliance program, such as AHJs, Energy Code compliance providers, Home Energy Rating System (HERS) Raters, Acceptance Test Technicians, and other Energy Code compliance professionals.**
* **Performing technical analysis to support CEC decisions related to the Home Energy Rating and Labeling program.**
* **Coordinating meetings with public stakeholders to support the proposal, adoption, and implementation of the proposed Home Energy Rating and Labeling program.**

**Contractor Task Deliverables:**

* **Updated compliance documents (forms)**
* **Updated data dictionaries**
* **Updated schemas for compliance documents**
* **Updated document templates (.xslt)**
* **Updated Data Registry Requirements Manual (DRRM)**
* **Updated Report Generator programming based on the above deliverables.**
* **Technical reports that support improvements to Energy Code compliance in both the residential and nonresidential sectors.**
* **Materials to support public workshops and formal proceedings to update California’s Home Energy Rating & Labeling program.**
* **Technical reports to support a CEC-proposed Home Energy Rating and Labeling program.**
* **Other deliverables to be defined as needed through WAs.**
1. Page 29, Section II under “Primary Tasks”updated:

**Task [**~~6~~**] 7: Contingencies**

The Contract team shall assist with work to develop program components beyond what is specifically described in Tasks 2[~~-5~~] **through 6** related to Energy Code Development Support.

1. Page 32, Section II under “Agreement Deliverables”added:

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| **6** | **Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support** |  |
|  | **Updated compliance documents (forms)** | **TBD per WA** |

1. Page 33, Section II under “Agreement Deliverables”added and updated:

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| **6** | **Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support** |  |
|  | **Updated data dictionaries** | **TBD per WA** |
|  | **Updated schemas for compliance documents** | **TBD per WA** |
|  | **Updated document templates (.xslt)** | **TBD per WA** |
|  | **Updated DRRM** | **TBD per WA** |
|  | **Updated Report Generator programming based on the above deliverables** | **TBD per WA** |
|  | **Technical reports that support improvements to Energy Code compliance in both the residential and nonresidential sectors** | **TBD per WA** |
|  | **Materials to support public workshops and formal proceedings to update California’s Home Energy Rating & Labeling program** | **TBD per WA** |
|  | **Technical reports to support a CEC-proposed Home Energy Rating and Labeling program.** | **TBD per WA** |
|  | **Other deliverables to be defined as needed through WAs** | **TBD per WA** |
| [~~6~~] **7** | **Contingencies** |  |

1. Page 36, Section III under “Approach to Tasks in SOW”added and updated:
2. **Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support**

 [~~6~~]**7**) Contingencies

1. Page 45, Section IV under “Evaluation of SOQ - Criteria”added and updated:
2. **Energy Code Compliance Documentation, Compliance Analysis & Compliance Data Infrastructure Support**

 [~~6~~]**7**) Contingencies

1. Page 56, Section VI under “Definition of Key Words & Acronyms”added:

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| **AHJ** | **Authorities Having Jurisdiction** |

1. Page 57, Section VI under “Definition of Key Words & Acronyms”added:

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| **DRRM** | **Data Registry Requirements Manual** |

1. Page 57, Section VI under “Definition of Key Words & Acronyms”added:

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| **FV&DT** | **Field Verification & Diagnostic Testing** |

1. Page 57, Section VI under “Definition of Key Words & Acronyms”added:

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| **HERS** | **Home Energy Rating System** |

1. Page 57, Section VI under “Definition of Key Words & Acronyms”added:

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| --- | --- |
| **Nonresidential Compliance Manual** | **The Nonresidential Compliance Manual developed by the CEC, under PRC, section 25402.1(e), to aid designers, builders, and contractors in meeting the energy efficiency requirements for nonresidential buildings.** |

1. Page 58, Section VI under “Definition of Key Words & Acronyms”added:

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| **Residential Compliance Manual** | **The Residential Compliance Manual developed by the CEC, under PRC, section 25402.1(e), to aid designers, builders, and contractors in meeting the energy efficiency requirements for residential buildings.** |

**Standard Agreement Example (Attachment 6)**

1. Page 9, Exhibit B, under “MULTI-YEAR FUNDING” updated:

There is a maximum of up to [~~$9,750,000~~] **$10,550,000** available to fund the Agreement. This is an hourly rate plus cost reimbursement contract with a ceiling on the total contract amount.

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| --- | --- |
| **FISCAL YEAR** | **AMOUNT** |
| 2024-2025 | $3,250,000 |
| 2025-2026 | [~~$3,250,000~~] **$3,650,000** |
| 2026-2027 | [~~$3,250,000~~] **$3,650,000** |

Funding for the Agreement is from Energy Research Programs Account (ERPA) and Cost of Implementation Account (COIA) funds. ERPA funds include $2,000,000 from FY 2024-2025; $2,000,000 from FY 2025-2026; and $2,000,000 from FY 2026-2027. COIA funds include $1,250,000 from FY 2024-2025; [~~$1,250,000~~] **$1,650,000** from FY 2025-2026; and [~~$1,250,000~~] **$1,650,000** from FY 2026-2027.

1. Page 36, Exhibit E, under section 2.c updated:

All employees working on Tasks 2-[~~6~~]**7** are “consultants” assigned to Disclosure Category 1*.*

1. Page 38, Exhibit E, under section 5.a.ii updated:

Under Section 3, Consultant Information, the Contractor shall write the name, job classification and email address for every employee working on Tasks 2-[~~6~~]**7**, along with the date that individual began work on the Agreement.

**Carissa Peri,**

**Commission Agreement Officer**