

# IBPSA-USA: Education Activities Education Strategic Plan Development

## Request for Proposals

Jun 10, 2025

### Overview:

One of the key offerings from IBPSA-USA to its membership is delivering high-quality educational content. IBPSA-USA seeks to develop and implement a multi-year vision for expanding the reach of its education activities by building upon ongoing efforts including BEMcyclopedia and previously-developed DOE-funded seminar course materials. The vision will identify a roll-out plan for educational offerings for IBPSA-USA members and other industry stakeholders. The overarching goal is to equip the industry with essential building performance simulation skills that support the design and operation of healthy, resilient, efficient and high performing buildings.

IBPSA-USA seeks a contractor to help develop its Education Strategic Plan. The contractor will coordinate with the IBPSA-USA Education Committee to review a previously developed draft roadmap, and expand it into a detailed strategic plan that includes a work plan and financial analysis.

Funding is provided by the Department of Energy, and the total budget for this scope of work is \$16,400.

### Scope of Work:

The Education Strategic Plan is expected to include (but not be limited to) the following activities. The contractor shall evaluate and provide recommendations to IBPSA-USA on these topic areas:

- Offering BEM Workshop and BEMP training as a live, instructor-led course (online and/or in-person) directly from IBPSA-USA (in addition to current offerings in partnership with ASHRAE)
- Creating an online system to allow participants to register for live training sessions
- Evaluating whether to develop a Learning Management System (LMS) or using existing LMS platforms to deliver on-demand training content
- Estimating costs for developing and hosting the LMS, populating the LMS with existing content, and developing new content
- Approaches to populating the LMS with BEM Workshop and BEMP Training content (i.e., length of training modules, supplementary activities, etc.)
- Developing a business model for offering content through the LMS
- Developing a curriculum for expanding the training offerings.
- Developing a marketing and outreach strategy for LMS and BEMcyclopedia.
- Managing educational content on the IBPSA-USA Youtube channel.
- Identifying key organizations for partnership and developing a collaboration framework.

The contractor shall develop the draft strategic plan, which the Education Committee plans to release to the IBPSA-USA mailing list to gather industry feedback. It is expected that the strategic plan developed during this project will be rolled out as part of future funded efforts.

#### Tasks

- Task 0 - Project Management
  - Attend online meetings with the Project Execution Committee (PEC)
    - Kickoff
    - Present outline of strategic plan to PEC for feedback
    - 50% progress check-in
    - Draft roadmap review
    - End of project debrief
- Task 1 - Develop the Draft Education Strategic Plan
  - Develop the strategic plan, covering the topic areas listed above
    - Coordinate with the IBPSA-USA Education Committee, and Project Execution Committee
    - Develop outline for the plan
    - Develop 50% progress draft
    - Share completed draft with the PEC, and incorporate feedback
    - Develop final draft

#### Deliverables and Timeline:

Deliverable/Milestone	Date
X20.4: Education Strategic Plan (outline)	7/2/2025
X20.4: Education Strategic Plan (50% progress draft and progress report memo)	8/15/2025
X20.4: Education Strategic Plan (final draft)	9/15/2025

#### Format for Submittals:

#### 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 the current IBPSA-USA educational offerings
  - b. Understanding of successful approaches to providing education to stakeholders in the building industry
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 **June 23**.