Public Works and Government Services Canada | Travaux publics et Services gouvernementaux Canada

RETURN BIDS TO:
RETOURNER LES SOUMISSIONS À:

Bid Receiving - PWGSC / Réception des soumissions - TPSGC
11 Laurier St. / 11, rue Laurier
Place du Portage , Phase III
Core 0A1 / Noyau 0A1
Gatineau, Québec K1A 0S5
Bid Fax: (819) 997-9776

LETTER OF INTEREST
LETTRE D'INTÉRÊT

Title - Sujet
RFI - DOLLARS TO $ENSE

Solicitation No. - N° de l'invitation	Date
23572-120839/A	2012-03-16

Client Reference No. - N° de référence du client	GETS Ref. No. - N° de réf. de SEAG
23572-120839	PW-$$ZH-123-23961

File No. - N° de dossier	CCC No./N° CCC - FMS No./N° VME
123zh.23572-120839	

Solicitation Closes - L'invitation prend fin
at - à 02:00 PM
on - le 2012-04-10

Time Zone
Fuseau horaire
Eastern Daylight Saving Time EDT

F.O.B. - F.A.B.
Plant-Usine: ☐ **Destination:** ☐ **Other-Autre:** ☐

Address Enquiries to: - Adresser toutes questions à:	Buyer Id - Id de l'acheteur
Grosser(123zh), Keith	123zh

Telephone No. - N° de téléphone	FAX No. - N° de FAX
(819) 956-3489 ( )	(819) 956-2675

Destination - of Goods, Services, and Construction:
Destination - des biens, services et construction:

Specified Herein
Précisé dans les présentes

Comments - Commentaires

Instructions: See Herein

Instructions: Voir aux présentes

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Delivery Required - Livraison exigée	Delivery Offered - Livraison proposée
See Herein	

Vendor/Firm Name and Address
Raison sociale et adresse du fournisseur/de l'entrepreneur

Telephone No. - N°de téléphone
Facsimile No. - N° de télécopieur

Issuing Office - Bureau de distribution
Training and Specialized Services Division/Division de la formation et des services spécialisés
11 Laurier St. / 11, rue Laurier
10C1, Place du Portage
Gatineau, Québec K1A 0S5

Name and title of person authorized to sign on behalf of Vendor/Firm (type or print)
Nom et titre de la personne autorisée à signer au nom du fournisseur/ de l'entrepreneur (taper ou écrire en caractères d'imprimerie)

Signature **Date**

Canada

REQUEST FOR INFORMATION (RFI)
FOR THE RENEWAL OF DOLLARS TO $ENSE TRAINING UNDER THE LEARNING SERVICES STANDING OFFER AND SUPPLY ARRANGEMENT FOR NATURAL RESOURCES CANADA

TABLE OF CONTENTS

SECTION "A"
REQUEST FOR INFORMATION OBJECTIVES

A1 Background

Canada is in the planning process to renew the Dollars to $ense (D2$) training under the Learning Services Standing Offer and Supply Arrangement (LS SOSA) in order to streamline operations, reduce delivery costs and increase the number of qualified suppliers. It is anticipated that a number of contractual arrangements will be established. It is anticipated that a competitive RFP for the D2$ training will be issued in the future.

Suppliers should note that the current LS SOSA refresh is posted on MERX, and that any interested parties wishing to become pre-qualified suppliers to provide services under the LS SOSA must submit proposals in response to solicitation E60ZH-070003/C.

A2 RFI Objective

The purpose of the RFI is to provide industry with an early opportunity to assess and comment on requirements, procurement strategy, and evaluation criteria in order to maximize best value to Canada, while reducing potential problems when the solicitation is posted.

This feedback will assist Canada in finalizing the requirements for the Solicitation. The RFI information herein will also provide potential Service Providers an update on the procurement in preparation for the eventual Solicitation.

A3 Requirement Definition

The information provided by Canada in this RFI is preliminary and may change. The final procurement approachfor the renewal may differ depending on responses to the RFI and other factors as the procurement process develops. This RFI is not a bid solicitation nor will it be used to pre-qualify or otherwise restrict participation in any future Solicitation. A contract will not result from this RFI. Responses will not be formally evaluated. Canada will not reimburse any expenditure incurred in preparing responses to this RFI.

Potential bidders may use this RFI to make known their comments on the draft Statement of Work, proposed procurement approach and methodology, potential evaluation and selection criteria.

Suppliers are to send their written comments in response to this RFI, via e-mail or fax, to the Contracting Authority named herein no later than April 10, 2012.

SECTION "B"
ADMINISTRATIVE MATTERS

B1 Submission of Responses

Responses may be sent to the Contracting Authority by e-mail. Contact information is contained in B2. The Respondent' name, return address, RFI solicitation number and closing date should be clearly visible on the response. Responses to this RFI will not be returned.

B2 Contracting Authority

The Contracting Authority (or delegated representative) is responsible for the management of the procurement and RFI process.

Keith Grosser
Spécialiste en approvisionnement / Supply Specialist
Division de la formation et des services spécialisés | Training and Specialized Services Division
Secteur de la gestion de l'approvisionnement en services et en technologies (SGAST) | Services and Technology Acquisition Management Sector (STAMS)
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Gouvernement du Canada | Government of Canada

B3 Industry Information Session

B3.1 General Industry Information Session

At present, there is no plan to hold a General Industry Information Session.

B3.2 Subsequent Individual Vendor Sessions

Following receipt of the RFI responses from industry, PWGSC **may** hold individual vendor sessions to provide vendors who have responded substantively to this RFI with the opportunity to clarify specific elements with regards to their response. These sessions are considered an extension of this RFI process and would be scheduled shortly after the RFI closing date.

B4 Industry Responses

B4.1 Response Format

For ease of use and in order that the greatest value be gained from responses, Canada requests respondents to follow the structure outlined in **Section D - Questions for Industry**. There is no page limit on the information to be provided.

Responses submitted in electronic format should be submitted in either Microsoft Word and/or Adobe PDF

B4.2 Language of Response

Responses may be in English or French, at the preference of the respondent.

B4.3 Response Parameters

Respondents are reminded that this is an RFI and not a Request For Proposal (RFP) and, in that regard, Respondents should feel free to provide their comments, concerns, and, where applicable, alternative recommendations on how the requirement may be satisfied. Also, in responding to this RFI, Respondents are asked to clearly explain any assumptions they may wish to make.

B4.4 Response Confidentiality

Respondents are requested to clearly identify those portions of their response that are proprietary to the Respondent. The confidentiality of each Respondent’s response will be maintained. However, due to the nature of the RFI activity, Respondents must be aware that aspects of their response may be used as a basis for modifying the draft documents as Canada prepares for the future procurement

SECTION “C”
PROCUREMENT STRATEGY

C1 <u>PROCUREMENT STRATEGY</u>

It is anticipated that this requirement will result in awarding a Contract(s).

Resources will be evaluated at the time of RFP issuance.

C1.1 Notification Method

The solicitation will be issued through the Government Electronic Tendering System (GETS) (merx.com).

C1.2 Contract Period

To be determined

C1.3 Number of Contracts

To be determined

C1.4 Selection Methodology

Lowest evaluated price responsive proposal.

C2 EVALUATION STRATEGY

C2.1 Financial Evaluation

To be determined

C2.2 Technical Evaluation

To be determined

C3 SECURITY CLEARANCE

It is anticipated that the minimum security requirement will be at the **SECRET** level.

SECTION “D”
QUESTIONS FOR INDUSTRY

The respondent is requested to provide comments/feedback on the following set of questions preferably in the order in which they appear.

D1.0 General

D1.1 A brief corporate profile of the respondent (or the actual or intended respondent consortium) including:

- name and phone number of a contact person
- an indication of level of interest in a potential Solicitation in whole or in part
- the regions and sub-regions of interest (see Annex C)
- the languages of instruction of interest (English, French or both)
- the products and services offered by your organization
- the size of your business (micro business 1- 4 employees, small business 5 - 50 employees, medium business 51 – 499 employees, large business 500+ employees)

D2.0 Statement of Work

D2.1 Do you have any concerns with respect to the tasks and/or reports and/or deliverables? If so, please outline your concern(s) and any recommendations to resolve them.

D2.2 Do you have any concerns with respect to the minimum mandatory qualifications outlined in Annex B? Should more academic credential(s) be considered? If so, what alternative solution would address your concern(s) and why?

D3.0 Evaluation Criteria

D3.1 Are there any comments and/or concerns with any of the Mandatory Criteria in Annex B that make this requirement too restrictive and/or unrealistic? If so, what alternative solution would address your concern(s)?

D3.2 Do you have any additional comments, concerns, and/or alternate solutions with respect to the Evaluation Criteria?

D4.0 Procurement Strategy

D4.1 Do you have any comments with respect to how many Contracts should be authorized for use per region and/or sub-region to fulfil this requirement? In Annex C, the respondent is requested to identify the region and/or sub-region where they can provide marketing and delivery of energy efficiency training.

D5.0 Additional Comments

D5.1 Are there any additional comments and/or concerns with respect to this proposed procurement that has not been addressed elsewhere? If so, what alternative solution would address your concern(s)?

ANNEX "A"
DRAFT STATEMENT OF WORK

See attached

ANNEX "B"
DRAFT MANDATORY QUALIFICATIONS

See attached

ANNEX "C"
PROPOSED REGIONS

See Attached

ANNEX A
STATEMENT OF WORK

Delivery of Dollars to $ense Energy Management Workshops

1.0 Definitions

For the purpose of this Statement of Work (SOW), the following definitions will apply:

1.1 Equipment: laptops to be used by participants (when required), demonstration kit, LCD projector and extension cords;

1.2 Hospitality: includes a continental breakfast, lunch and refreshments during breaks at the Dollars to $ense workshops for trainers and participants;

1.3 Material: includes slide presentations, course manuals, classroom exercises, case studies and interactive spreadsheet tools;

1.4 Workshop: an interactive course during which trainers explain the concepts of energy management and guide participants through exercises that will enable them to understand the concepts put forward and apply them to their organization.

2.0 Title

Delivery of the Dollars to $ense energy management workshops

3.0 Objectives

To select organizations that will be responsible for delivering training workshops to individuals wishing to take Dollars to $ense energy management training. These workshops are designed for individuals who participate in or are responsible for energy management, including but not limited to: energy managers, financial managers, energy consultants, accountants and controllers, project managers, building managers, plant engineers, and trades-people.

The Dollars to $ense energy management workshops are designed to help build capacity within organizations to identify and implement energy saving projects and practices. The information communicated in the workshops will enable participating organizations to reduce energy consumption and greenhouse gas (GHG) emissions and save money.

There are seven workshops of which the first six are standard:

1. Energy Management Planning (EMP)
2. Spot the Energy Savings Opportunities (SPOT)
3. Energy Monitoring (EM)
4. Energy Efficiency Financing (EEF)
5. Recommissioning (RCx)
6. Energy Management Information Systems (EMIS)
7. Customized

4.0 Background

NRCan's Office of Energy Efficiency (OEE) is Canada's center of excellence for energy conservation, energy efficiency and alternative fuels information. It plays a dynamic leadership role in helping Canadians reduce energy costs while contributing to a healthier environment and reducing GHG emissions.

The Dollars to $ense workshops are designed to help organizations improve energy intensity and reduce energy-related GHG emissions and criteria air contaminants. The energy management workshops are tailored to address the needs of industrial, commercial, institutional and public sector organizations and enable them to realize energy-savings and emission-reducing investments.

The OEE has delivered Dollars to $ense training to over 23,000 energy managers, facility managers and operations and maintenance staff in Canada's industrial, commercial and institutional sectors since 1997, resulting in 1MT of avoided emissions and $160 million in annual energy savings.

5.0 Applicable Documents

The following documents form part of the requirements to the extent specified herein, and are supportive of the Requirements when referenced in section 3 - Requirements. All other document references are to be considered supplemental information only.

a. Appendix 1 – Workshop Summaries (EMP, SPOT, EM, EEF, RCx, EMIS)
b. Appendix 2 – Participant Feedback Form

6.0 Business Volume

The estimated number of workshops by stream is shown below.

	2012 - 2013	2013 - 2014	2014 - 2015	2015 - 2016
Stream 1 English				
A- Standard : (EMP, SPOT, EM, EEF, RCx, EMIS)	38	38	38	38
B- Customized	60	60	60	60
SUB-TOTAL	98	98	98	98
Stream 2 French				
A- Standard : (EMP, SPOT, EM, EEF, RCx, EMIS)	7	7	7	7
B- Customized	10	10	10	10
SUB-TOTAL	17	17	17	17
TOTAL	115	115	115	115

The estimated business volume is only an approximation of requirements given in good faith by Canada.

7.0 Dollars to $ense Workshops

The OEE offers six (7) Dollars to $ense workshops which are delivered in major cities across the country. Workshop materials developed by the OEE include slide presentations, course manuals, classroom exercises, case studies and interactive spreadsheet tools. A brief description of the EMP, SPOT, EM, EEF, RCx, and EMIS Workshops follows; more information is available in Appendix 1 - Workshop Description of this SOW. Two trainers or one trainer and one assistant trainer are involved in delivering the workshops which has a minimum of 10 participants and a maximum of 20. The same trainers and assistant trainers can deliver other workshops if they meet the requirements.

7.1 Energy Management Planning (EMP)

Shows participants how to build a framework for integrating an energy management program into an organization by:

- assessing an organization's energy management development;
- getting commitment from someone at the highest level of the organization;
- building an energy management team and determining roles and responsibilities of team members;
- developing a clear understanding of how a facility uses energy;
- setting energy efficiency goals and objectives;
- building an energy-saving culture in the workplace.

7.2 Spot the Energy Savings Opportunities (SPOT)

Provides a method and principles to help organizations identify and prioritize energy savings opportunities by:

- describing the basic principles of thermal and electrical energy;
- explaining the incremental cost of energy;
- explaining when and where energy is used;
- finding and explaining potential energy saving opportunities;
- generating and prioritizing a list of energy saving opportunities by providing examples.

7.3 Energy Monitoring (EM)

Provides a systematic approach to gaining and maintaining control over energy consumption through measurement and analysis by:

- explaining energy, and energy efficiency versus demand;
- identifying energy consumption data to be collected;
- describing and quantifying the relationship between energy and what is driving its consumption;
- explaining time series, regression, cumulative sum (CUSUM), and control charts;
- listing and describing methods to establish energy efficiency targets;
- applying the principles of monitoring to the measurement and verification of energy consumption data;
- determining how to prepare reports for different levels of management.

7.4 Energy Efficiency Financing (EEF)

Increases participant awareness and skill in obtaining financing for energy efficiency projects by:

- identifying components of the decision-making process involved in obtaining capital to implement energy efficiency projects;
- applying a process to calculate the economic value of an energy efficiency project;
- developing skills in preparing and presenting a business case;
- understanding the financial aspects of an energy performance contract (EPC);
- identifying the resource requirements, management and decision-making needs, as well as the risks, associated with an EPC.

7.5 Recommissioning (RCx)

Increase awareness and knowledge about the fundamental principles and components of Building Recommissioning by:

- identifying the RCx principles and process, and identifying RCx benefits and opportunities
- applying a RCx project pre-screening tool in order to select good building candidates
- developing a business case to obtain approval from upper management
- preparing and presenting an RCx project to management
- managing a RCx project
- building and empowering an RCx team

- identifying a list of issues, preparing an investigation report, selecting improvements for implementation plan
- sustaining RCx performance improvements.

7.6 Energy Management Information Systems (EMIS)

Providing an overview of EMIS, how it saves energy and money and supports ISO 50001 implementation by:

- making energy performance visible to people at different levels of the organization
- implementing EMIS will establish a foundation for complying the new ISO Energy Management Systems Standard
- establishing energy performance models to predict energy consumption
- defining the energy account centers (EACs)
- assessing current versus desired data analysis and reporting
- leaning how to generate functional definition of proposed EMIS, identify recommendations for change and estimate benefits and costs
- preparing a report and presenting a business case
- describing what is required for an EMIS implementation plan

7.7 Customized workshops

Customized workshops are geared to an organization's energy management training needs using material from the workshops described in articles 7.1, 7.2, 7.3, 7.4, 7.5,and 7.6 of this SOW. Organizations such as companies, trade associations, utilities and provincial, federal or municipal agencies can request that the OEE provide customized workshops at a site that they have chosen. The process begins with an OEE officer and the Offeror's trainer meeting (in person or via a conference call) with representatives of the organization to determine the scope of work to be carried out. The trainer then collects additional energy consumption data and confirms areas of interest in energy management with the organization's representatives. The collected data from the consultations are incorporated into a workshop that specifically addresses the organization's particular needs in energy management.

8.0 Location and Language of the Workshops

The Dollars to $ense workshops need to be delivered all across Canada, in sub-regions as specified in Annex C. They need to be offered in English and/or French according to the needs of sub-region.

9.0 Scope of Work

The following are the roles and responsibilities that constitute the scope of work for this RFI:

1. Workshop orientation
2. Conduct workshops
3. Development of customized workshops
4. Provide advice and support to Dollars to $ense program

9.1 Workshop Orientation

To ensure consistency in workshop delivery and allow the organization's trainers to become familiar with the workshop material, all trainers must attend the Workshop Orientation session offered by NRCan, which will take place within three (3) months after the Contracts are awarded.

The Workshop Orientation session will provide information and demonstrations of key elements of the workshops and be delivered in Ottawa. This orientation session is for English and French trainers. The session will last approximately six (6) days and cover the following:

- a review of the components of the different workshops, including but not limited to the course outline, key learning objectives, and the course material (trainer's binder, participant binder, slide presentation, class exercises, handouts, and other tools including the demonstration kit); and

- a review of adult learning techniques, learning styles and group dynamics, effective communication and effective presentation delivery.

9.2 Delivery of a Standard or Customized Workshop

All workshops will start at 8:30 a.m. and end at 4 p.m. unless otherwise specified in the discussions for a customized workshop. The trainer will allow for two fifteen-minute breaks, one in the morning and one in the afternoon, and a one-hour break for lunch.

The trainer will present the course content in French or in English as specified in the call-up. In conjunction with delivering the slide presentation, the trainer will present the individual and group exercises, will assist the participants and will guide them through the exercises by answering their questions.

At the end of the workshop, the trainer will distribute the Dollars to $ense certificates as well as the workshop evaluation form provided by the PA to participants and collect them once they have been completed. The trainer must be available, if necessary, for up to sixty minutes after the workshop, to answer questions from participants.

9.3 Development of Customized Workshops

Upon the request and authorization of the PA, the Offeror will prepare a customized workshop on energy management for a specific organization. Preparing a customized workshop involves determining the workshop objective(s) and modifying the standard workshop materials to meet the objective(s). Material for the customized workshop must be reviewed and approved by the PA before delivering the workshop to an organization.

Prior to delivering a customized workshop, the Offeror may be required to do some or all of the following:

- meet and consult with an organization’s representative and visit their premises;
- assemble historical energy consumption data, analyze energy management needs and solicit input from the organization’s representative;
- modify the existing workshop slide presentations for the organization;
- research and develop case studies and examples relative to the specific organization's needs;
- modify existing energy management samples and exercises for the organization; and
- develop a promotional piece to describe the customized workshop for the organization.

9.4 Other Related Services

At the request of the PA, the Offeror will provide advice and support to the Dollars to $ense Program by:

- participating in meetings at the PA's request to discuss workshop-related matters;
- advising the PA on updates to workshop material (e.g. improvements to slide presentations and demonstrations);
- revising/producing new workshop material related to the existing workshops;
- responding to enquiries from workshop participants after a workshop has been held; and
- assembling and updating demonstration equipment.

10 Deliverables

The Offeror must complete a Dollars to $ense post-workshop report using the template provided by the PA. The report must be received by the PA no later than seven (7) working days following the completion of a workshop.

The Offeror must submit the list of workshop attendees, including new registrants (walk-ins), to the PA no later than seven (7) working days following the completion of a workshop. The Offeror must submit the completed workshop evaluation forms to the PA no later than seven (7) working days following the completion of a workshop. An example is attached as Appendix 2 - Participant Feedback.

The offeror must bring to each workshop the trainer's materials which include demonstration equipment, speaking notes, a slide presentation, an LCD projector and in some cases up to five (5) laptops provided by the PA to be used by the participants.

Offerors must supply one (1) personal PC based or MAC laptop to their trainers for projecting slides and for demonstrating the computer-based class exercises (Excel spreadsheet or worksheet tools) such as the Energy Efficiency Value Calculator and the energy monitoring software model. The Offeror must have the following software: Microsoft Word, Excel, and PowerPoint.

11 NRCan's Support

The PA will be responsible for the following:

(a) producing and supplying all workshop material and initiating and approving updates to this material;

(b) marketing the Dollars to $ense workshops to potential clients;

(c) providing the Offeror with a schedule of the workshops to be delivered at least 2 months prior to the start of each workshop;

(d) providing the Offeror with the required logistical information to deliver the Dollars to $ense workshops (e.g. date, location, hospitality and equipment arrangements);

(e) managing the registration process for Dollars to $ense workshops including payments for workshop attendance and inquiries about workshops;

(f) providing the Offeror with a list of registered participants for standard workshops prior to the workshops;

(g) shipping materials to the workshop location five days prior to the workshop;

(h) providing the Offeror with equipment, including up to five (5) laptops to be used by participants (when required), a demonstration kit, one (1) LCD projector and extension cords;

(i) arranging and paying for the venues, equipment rentals, hospitality and shipping of materials for standard workshops;

(j) coordinating discussions with customized workshop clients and ensuring that all the necessary logistical arrangements are made for delivering these workshops; and

(k) sending an OEE representative to attend selected Dollars to $ense Workshops, to provide performance feedback to the Offeror, based on the OEE representative's evaluation and the participant evaluation forms.

APPENDIX 1 TO ANNEX "A"
WORKSHOP SUMMARIES

1. Workshop: Energy Management Planning (EMP)

How to build a framework for an energy management program in your organization

Module	Concept	Action
Introduction	• Trainer introduction • Course overview	Each participant gives: • name, title, company • #1 learning objective in coming to the course
Topic Introduction	• The importance of a holistic and integrated approach to energy management • Plan for the day	• Participants fill in an Energy Management Matrix (a simple diagnostic tool). • Provide *success stories* showing strategic approach
Commitment	Importance of a commitment, a champion, a team	• Participants write an Energy Vision Statement for their organization • Provide samples of annual reports
Understanding	Different management cultures	Evaluate monitoring reports.
Plan	Plan components • Goals, objectives, targets, actions • Project implementation • Evaluating and financing energy projects • People (roles and responsibilities) • Monitoring • Communication in energy management	• Participants develop objectives, targets and organized actions • Explain and demonstrate an energy monitoring spreadsheet and an energy efficiency financing spreadsheet • Provide examples of success interviews • Bring tangible samples (stickers, mugs, etc.)
Do It!	Necessity of implementing the plan	Give examples of "Done it": • Dupont Case Study • Zellers Case Study
Evaluate, Celebrate	Benefits of evaluation, ongoing reporting, and future planning	
Wrap Up	Review of: • Lesson objectives • Participant objectives	

2. Workshop: Spot the Energy Savings Opportunities (SPOT)

How to spot energy savings opportunities in your organization: tools and priorities

Module	Concept	Action
Introduction	• Trainer introduction • Course overview	Each participant gives: • name, title, company • #1 learning objective in coming to the course
Energy Basics	Basic principles of thermal and electrical energy	• Electricity basics demonstration • Coffee-maker demonstration
Seven Steps	Technical approach	
1. Understand Costs	Understanding the incremental costs of energy and how they are billed	Participants calculate energy bills
2. Compare Yourself	Finding savings opportunities through benchmarking	Benchmarking exercise with participants
3. Understand When	• When does your organization use energy? • Making use of your demand profile	
4. Understand Where	• Where does your organization use energy? • Taking an inventory of energy use (energy pie)	Examples of demand profile & load inventory (case study for arena/ school)
5. Eliminate Waste	Finding savings opportunities through the elimination of waste	Participants identify savings opportunities
6. Maximize Efficiency	Finding savings opportunities through eliminating losses	
7. Optimize the Supply	Alternate sources of energy that can be used to reduce purchased inputs	
Checklist	Examples of steps 5,6,7 applied to energy consuming systems (HVAC, motors, fans and pumps, fuel-fired equipment and boilers, insulation, refrigeration, compressed air, lighting, heat recovery, renewable energy)	Hands-on demonstration of different systems such as pumping, compressed air, motor, fans, and lighting
Assess Benefits	• Summary of the benefits and costs as part of a business case. • Review of lesson objectives	Group discussion on key elements
Wrap Up	Review of participant objectives	

3. Workshop: Energy Monitoring (EM)

How to detect changes in energy use: measuring and verifying your savings

Module	Concept	Action
Introduction	• Trainer introduction • Course overview	Each participant gives: • name, title, company • #1 learning objective in coming to the course
Topic Introduction	Benefits of tracking, targeting, and verifying energy consumption and savings	Participants fill in the monitoring & targeting matrix (a simple diagnostic tool)
Energy Use Fundamentals	Units, impact variables, energy vs. demand, recording meters, watt meters	Participants do energy conversion, and compare different energy forms
Data Collection	Understanding and identifying data to be collected to enable M&T	Meter reading
Monitoring Fundamentals	• The relationship between energy use and what is driving it • How this relationship changes over time	• Calculation of balance point, data normalization • The cumulative sum (CUSUM) worksheet (represents the accumulated reduction or increase in consumption versus the base line)
Targets	Methods for establishing realistic targets for future energy performance	• Benchmarking exercise • Data review • Data analysis to identify improvement potential
Evaluation	Applying the principles of monitoring to measurement and verification of project savings	International Performance Measurement and Verification Protocol (IPMVP) exercise
Reporting	• Identifying what is important in monitoring • Ensuring that what you report is understood throughout your organization	• Group discussion: who sees what and when it's seen • Examples of at least 5% savings attributable exclusively to monitoring
Applications	• Hardware & software requirements • Their use in monitoring	• Recording equipment demonstrations • Software demonstrations
M&T benefits	Review of monitoring benefits	
Wrap Up	Review of participant objectives	

4. Workshop: Energy Efficiency Financing (EEF)

How to get the financing you need for your Energy Efficiency projects

Lesson	Concept	Action
Introduction	• Trainer introduction • Course overview	Each participant gives: • name, title, company • #1 learning objective in coming to the course
Topic Intro	• Winning competition for internal capital • Understanding non-routine financing	
Routine Financing	• Understanding the organization's capital decision-making process, decision-makers, and decision criteria • Calculating the financial value of an energy efficiency project and identifying "other" benefits relevant to decision-makers • Preparing and presenting a high-level executive presentation	• Individual exercise and group discussion to identify different types of decision-makers and decision criteria • Small group exercise: perform a financial analysis of an EE Project (routine financing) using the EE Value Calculator • Small group exercise: simulate capital decision-making process via an exercise using the EE Value Calculator • Small group & individual exercise: prepare and deliver a 3-minute "elevator speech" presenting an EE project in terms of strategic, financial and operational value.
Non-Routine Financing	Understanding: • Energy Performance Contracting (EPC) basics • Underlying financial transaction of an EPC • Organizational impacts and decision-making requirements for developing an EPC project	• Use EE Value Calculator to simulate an EPC transaction • Use EE Value Calculator to make decisions between routine and non-routine financing • Group & individual exercise: application of the EPC decision & resource mapping tool to determine the decision-making and resource requirements throughout the EPC process
Wrap-up	• Summary review • Applicability • Closing of the day	• Key elements of routine and non-routine financing • Close out summary • Review of lesson learning objectives • Review of participant learning objectives

5**. Workshop: Recommissioning (RCx)**

Increase awareness and knowledge about the fundamental principles and components of Building Recommissioning

Lesson	Concept	Action
Introduction	• Trainer introduction • Purpose and content of workshop	Each participant gives: • name, title, company • learning objective in coming to the course
RCx Principles and process	• Description of RCx in succinct and non-technical way • Identifying benefits and opportunities	• Plenary discussion to identify benefits and opportunities
Opportunity Identification	• Identifying good candidate buildings with a high potential • Providing instructions on how to use the RCx pre-screening tool • Selecting buildings within a portfolio	• Using RCx project pre-screening tool to select a building candidate.
Project Definition and Initiation	• Identifying initial steps and defining project scope and objectives • Developing a sound case including energy and non-energy benefits	• Individual development of key messages • Group activity to develop, present and evaluate the “elevator speech
Managing RCx Projects	• Prioritize the recommended measures to implement • Identification of a RCx team • Managing the investigation and implementation phases of RCx project	• Individual / whole group discussions on the RCx team • Develop a management framework • Selecting improvements
Sustaining RCx Performance Improvements	• Producing the RCx final report • Describing a hand-off meeting • Understanding the importance of staff training • Maintaining improved performance • Integrating RCx recommendations into on-going capital and operating plans and budget	• Participants prepare a hand-off meeting – hand-off meeting role play • Discussion in groups (3) and all groups on implementation strategies used in their organizations
Wrap-up	• Reviewing workshop objectives • Determining if learning need were met	• Roundtable • Participants complete written evaluation

6. **Workshop: Energy Management Information Systems (EMIS)**

Provide an overview of EMIS and show that EMIS supports ISO 50001 implementation

Lesson	Concept	Action
Introduction	• Trainer introduction • Purpose and content of workshop	Each participant gives: • name, title, company • learning priorities
EMIS Definition	• Describing EMIS, technical elements and people involvement • Describing ISO 50001 • EMIS in support of ISO 5001	•
Basic Principles	• Describing Energy Performance • Showing how EMIS saves money • Applying CUSUM • Who takes actions	• Participants identify who needs what
Audit overview and steps	• Defining the purpose of EMIS • Understanding the Organizational Management Context • Defining the Energy Account Centers (EACs) • Assessing energy metering • Estimating Benefits and costs • Preparing Business Case	• Participants define the EMIS purpose • Participants analyse the Management systems • Participants define the EAC structure • Participants assess current meetering and identify new metering needs • Participants identify energy savings • Participants prepare and present a business case
Implementation Planning	• Describing the EMIS implementation plan • Explaining conceptual design and detailed design • Reviewing the EMIS implementation	•
Wrap-up	• EMIS is a continuous improvement tool • Dollars to $ense Workshops • OEE - NRCan	• Review participants learning priorities • Participants complete evaluation

APPENDIX 2 TO ANNEX A

Dollars to $ense Energy Management Workshops

Participant Evaluation/Feedback Form

Participant Information

Name: ____

Organization: ____________________ Sector: ____________________

E-mail: ____

Indicate the workshop you have attended today. (✓)

- ☐ Energy Management Planning
- ☐ Spot the Energy Savings Opportunities
- ☐ Energy Monitoring
- ☐ Energy Efficiency Financing
- ☐ Energy Management Information Systems
- ☐ Recommissioning

1. How would you rate the overall quality of the workshop? (✓)
   - ☐ Excellent
   - ☐ Very Good
   - ☐ Good
   - ☐ Fair
   - ☐ Poor

2. Please indicate how strongly you agree or disagree with the following statements. (Circle your answer.)

		Strongly Agree				**Strongly Disagree**
a.	The objectives of the workshop were clear and precise	5	4	3	2	1
b.	The workshop was well organized	5	4	3	2	1
c.	The overhead slides and case studies were useful	5	4	3	2	1
d.	The exercises and demonstrations were informative	5	4	3	2	1
e.	The additional reference material was useful	5	4	3	2	1
f.	The workshop was the right length of time	5	4	3	2	1
g.	The trainers presented the course material effectively	5	4	3	2	1
h.	Class participation was encouraged	5	4	3	2	1
i.	The trainers were knowledgeable about the topic	5	4	3	2	1
j.	The workshop has increased my awareness of good energy management practices	5	4	3	2	1
k.	I intend to use what I learned at this workshop to improve the energy management practices in our organization	5	4	3	2	1

3. Are there ways that this workshop could be improved? If so, please describe below.

4. Are you interested in attending workshops on other energy efficiency topics? ☐ Yes ☐ No
If yes, what topics interest you most? (✓)

- ☐ Identifying Energy-Savings Opportunities
- ☐ Energy Monitoring
- ☐ Developing an Energy Master Plan
- ☐ Financing Energy Efficiency Projects
- ☐ Strategies to Increase Employee Awareness
- ☐ Combustion Systems
- ☐ Lighting Systems
- ☐ Motors & Drives
- ☐ Fans & Pumps
- ☐ Compressed Air Systems
- ☐ Waste Heat Recovery
- ☐ Refrigeration
- ☐ Other (specify)

5. In what area of your organization do you work? (✓)

- ☐ Engineering ☐ Marketing
- ☐ Operations ☐ Management
- ☐ Maintenance ☐ Other
- ☐ Finance/Accounting

6. Are you responsible for energy management in your organization? ☐ Yes ☐ No

7. If yes, what is your organization's annual energy consumption? (✓)

- ☐ Less than $100,000
- ☐ $100,000 to $250,000
- ☐ $250,000 to $500,000
- ☐ $500,000 to $1,000,000
- ☐ More than $1,000,000

If you would like us to inform someone else about future energy efficiency workshops, please indicate their name and contact information below.

Name: ______________________________

Organization: ______________________________

City: ____________________ Telephone: ____________________

Any other comments:

Thank you for sharing your views with us!

ANNEXE B
Critères d’évaluation

A. Critères techniques obligatoires

L’organisation doit satisfaire aux critères techniques obligatoires figurant dans le tableau ci-dessous. Elle doit en outre fournir la documentation venant appuyer le respect de cette exigence.

Toute offre de la part d’une organisation ne répondant pas aux critères techniques obligatoires sera jugée non recevable. Chaque critère devrait être abordé séparément.

Numéro	Critères techniques obligatoires	Instructions relatives à la préparation de l’offre
CTO1	L’offrant **doit** démontrer qu’il a acquis une expérience dans la prestation d’au moins trois (3) ateliers, similaires à ceux décrits à l’annexe A et d’une durée d’au moins une journée chacun au cours des cinq (5) dernières années par rapport à la date de clôture de la demande de soumissions.	L’information suivante, au minimum, **doit** être fournie pour chaque atelier : • Nom de l’organisation cliente; • Résumé/Description (y compris la nature du travail réalisé et les éléments livrables); • Date des ateliers (mois/année).
Ressources proposées à l’offrant		
Numéro	**Critères techniques obligatoires**	**Instructions relatives à la préparation de l’offre**
CTO2	L’offrant **doit** fournir le nom d’au moins trois formateurs qu’il embaucherait pour donner les ateliers Le gros bons $ens.	L’information suivante, au minimum, **doit** être fournie : • Nom des formateurs
CTO3	Le formateur doit avoir au minimum : A – un diplôme universitaire ou un diplôme/certificat collégial dans une (1) des disciplines suivantes : génie, technique du génie, design industriel, sciences, architecture, études environnementales, administration des affaires ou économie OU une désignation de comptable agréé (CA) ou de comptable général accrédité (CGA). B – de l’expérience dans la réalisation de projets de gestion de l’énergie. Seuls les projets s’étant déroulés depuis le 1er janvier 2000 et comportant un minimum de cinq (5) jours de travail seront évalués. C – de l’expérience, comme formateur, dans la prestation d’ateliers sur la gestion de l’énergie à l’intention d’un public industriel, commercial ou institutionnel. Seuls les ateliers s’étant déroulés depuis le 1er janvier 2000 seront évalués.	L’information suivante, au minimum, **doit** être fournie pour chaque formateur : A – nom du formateur, nom de l’université/du collège, nom de la discipline (programme), preuve de la désignation CA/CGA, s’il y a lieu. B – pour chaque projet : nom du client, date d’achèvement du projet (mois et année), description du projet, nombre de jours de travail, responsabilités du formateur. C – pour chaque atelier : nom de l’atelier, nom du client, date de l’atelier, type de participants (industriel, commercial ou institutionnel), aperçu du contenu, responsabilités du formateur.

ANNEX C
PROPOSED REGIONS

<table>
<tr><td colspan="6">The respondent can provide delivery of energy management workshops (as specified in Statement of work) within 100 km of the following sub-regions. Check all that apply.</td></tr>
<tr><td>Region</td><td>Sub-region</td><td></td><td>Region</td><td>Sub-region</td><td></td></tr>
<tr><td rowspan="3">Atlantic</td><td>St. Johns NL</td><td></td><td rowspan="4">Western</td><td>Winnipeg MB</td><td></td></tr>
<tr><td>Halifax NS</td><td></td><td>Regina SK</td><td></td></tr>
<tr><td>Moncton NB</td><td></td><td>Calgary AB</td><td></td></tr>
<tr><td rowspan="2">Québec</td><td>Montreal</td><td></td><td>Edmonton AB</td><td></td></tr>
<tr><td>Québec</td><td></td><td rowspan="2">Pacific</td><td>Vancouver BC</td><td></td></tr>
<tr><td rowspan="4">Ontario</td><td>Ottawa</td><td></td><td>Victoria BC</td><td></td></tr>
<tr><td>Toronto</td><td></td><td></td><td></td><td></td></tr>
<tr><td>London</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Kingston</td><td></td><td></td><td></td><td></td></tr>
</table>

NOTE: These are the top 15 cities of workshop delivery for the past 14.5 years as per the Workshop statistical report attached on the next page.

Workshop Statisitics

Beginning 1997 - October 31 2011 (14.5 years)

Locality	Province	# Ws	Ws/year	# Part.	Part/Ws
Toronto	ON	167	11.5	3 282	20
Vancouver	BC	90	6.2	1 779	20
Ottawa	ON	79	5.4	1 470	19
Montreal	QC	74	5.1	1 053	14
Calgary	AB	67	4.6	1 036	15
Halifax	NS	63	4.3	1 029	16
Winnipeg	MN	48	3.3	759	16
Edmonmton	AB	47	3.2	744	16
Quebec	QC	42	2.9	556	13
Moncton	NB	32	2.2	454	14
St. Johns	NF	28	1.9	379	14
London	ON	22	1.5	381	17
Kingston	ON	19	1.3	238	13
Regina	SK	19	1.3	286	15
Victoria	BC	17	1.2	196	12
Mississauga	ON	16	1.1	241	15
Saint John	NB	15	1	157	10
Fredericton	NB	14	1	219	16
Hamilton	ON	15	1	207	14
Thundr Bay	ON	14	1	194	14
Windsor	ON	14	1	178	13
Saskatoon	SK	15	1	171	11
Quelph	ON	11	0.8	173	16
Sudbury	ON	11	0.8	134	12
Barie	ON	9	0.6	172	19
Brampton	ON	9	0.6	167	19
Belleville	ON	8	0.6	164	21
Whitehorse	YK	8	0.6	120	15
Kitchener	ON	8	0.6	117	15
Sarnia	ON	7	0.5	344	49
Woodstsock	ON	7	0.5	101	14
Trois-Rivieres	QC	7	0.5	113	16
Richmond	BC	7	0.5	124	18
Kelowna	BC	6	0.4	91	15
Bowmanville	ON	6	0.4	182	30
Gatineau	QC	5	0.3	41	8
Bathurst	NB	5	0.3	49	10
Charlottetown	PEI	5	0.3	52	10
Aurora	ON	5	0.3	55	11
Oakville	ON	5	0.3	133	27
Timmins	ON	5	0.3	61	12
Yellowknife	NWT	5	0.3	66	13
Stratford	ON	5	0.3	93	19