

4 Players Club Drive, Suite B Charleston, WV 25311 T 304.343.2880 F 866.894.3947 WVGreenWorks.com DUNS 962 408 766

May 25, 2010 '

Mr. Frank Whittaker State of West Virginia Department of Administration Purchasing Division 1900 Kanawha Boulevard, East Charleston, WV 25305-0311

Dear Mr. Whittaker:

We're pleased to submit this proposal to design and deliver regional presentations focused on energy-efficiency code adoption and best practices in high-performance building.

WV GreenWorks, Inc. is a statewide workforce development and advocacy resource dedicated to sustainable industry and job growth. We work to link advocates, organizations, policy makers, practitioners, and business and community leaders to develop green economy initiatives that benefit all West Virginians. We are a registered non-profit 501 (c) (3) organization, and we also provide affordable, effective training and consulting to individuals, businesses and organizations.

Our project plan blends the code and high-performance building expertise of McKinley and Associates' Thom Worlledge, the state's first LEED Accredited Professional and sustainable design expert, with our program development, facilitation, and consensus-building expertise.

Together we bring impeccable national credentials in subject matter; deep experience in organization development, culture change management, and training design and delivery. Strong ties to national standard-bearers US Green Building Council (USGBC) and American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) increase our credibility, knowledge and commitment to high performance building standards.

Because we are both committed stakeholders in West Virginia's built community and the improvement of West Virginia, we understand the complexities of code adoption from an historical, internal perspective, so a customized and personal approach to inviting and addressing each Regional Planning and Development Council's stakeholders is possible. Every aspect of this effort is important to us, from crafting the invitation to the conversation, to information sharing and gathering feedback from stakeholders, to following up with data and recommendations. The conversation won't begin and end within each two-hour session. Thom and I will continue to be resources long after this contract is completed.

We bring an important and perhaps rare community relations component to this project. Our official bid includes costs for what we feel is a necessary outreach and facilitation strategy. We propose an additional outreach/publicity option for your consideration that would accelerate the general population's understanding and adoption of the most modern efficiency standards. Demand from a well-informed general population will help drive energy efficiency and building code excellence, and create jobs. Details are provided within the Scope of Services attached.

Thank you for allowing us the opportunity to express our interest in this initiative. For further information, please contact me at 304.343.2880 or at sarah@wvgreenworks.com.

Regards,

Sarah Haistead Boland Executive Director WV GreenWorks, Inc. 2010 HAY 25 PM 1:0

WY PURCHASING DIVISION



Proposal for the WV Division of Energy's Building Energy Collaborative Training and Facilitation

The True Cost of Energy Efficiency and Code Adoption

Executive Summary

WV GreenWorks, Inc., in partnership with McKinley and Associates, proposes to research, design and deliver ten two-hour energy-efficiency and building code presentations for West Virginia's 11 Regional Planning and Development Council regions.

We've designed a comprehensive work plan that combines education, information, marketing and targeted media campaigns tailored for the built community stakeholders, including officials responsible for the adoption, application and enforcement of the state's building code. Collateral pieces will be well-designed and printed in color to increase readability and value in the recipients' perception. Printed resources are designed to have extended shelf-life, to be used as job aids and desk references for participants. Due to the limited capacity of each Regional Planning and Development Council to publicize events, WV GreenWorks will create and manage a targeted campaign to invite each region's stakeholders. The campaign will include professional media and public relations strategies in collaboration with the regional councils.

► Each two-hour presentation will

- clearly compare, contrast and communicate building requirements, energy, and cost savings of the 2009 IECC and ASHRAE 90.1-2007 standards with 2003 IECC and ASHRAE 90.1-2001 standards:
- feature high performance building best practices, resource-efficient technologies, and a range of professional development options;
- identify and address local challenges associated with code adoption, compliance, and enforcement;
- communicate factual, third-party research-based benefits of residential and commercial energy-efficient and high performance building to each stakeholder segment of the built community; and will
- include an information packet per participant featuring at least six fact sheets.

► <u>To encourage broad, statewide participation among stakeholders,</u> WV GreenWorks will

- create, host and internally advertise an online repository of quick reference materials containing fact sheets specifically designed for these regional presentations, industry best practices, and energy-efficient product information.
- host an online discussion forum in which best practices, standards, challenges and solutions can be readily shared.

► A project summary report will

- reflect achievements, obstacles, insights; and
- recommend a baseline of residential building practices developed from feedback from stakeholder meetings.

▶ Optional Services: WV GreenWorks proposes an additional set of strategic internal and external communication services to firmly establish and brand the Building Energy Collaborative and its activities, further positioning the WV Division of Energy as proactive, transparent, and forward thinking.

A variety of professional communication strategies are recommended to accelerate and broaden public understanding of the benefits of building codes, energy efficiency standards, and cost-benefits of energy-efficient technologies and practices for every West Virginian, including builders and municipalities. Details and costs are given in the Scope of Services section.

Scope of Service

WV GreenWorks will design and deliver ten regional two-hour presentations according to the following work plan. The ▶ symbol indicates a fact sheet, report, or other deliverable that will be made available to participants and Division of Energy staff. Project management, travel and other expenses, printing, graphic arts, and essential media and outreach support are included in the basic option outlined below.

Hour One:

Objective

Compare and contrast building requirements and the energy and cost savings of the 2003 IECC/ASHRAE 90.1-2001 and the 2009 IECC / ASHRAE 90.1-2007.

- Address compliance simplification in later codes related to consolidation of climate zones.
- Include information on non-energy-related benefits of building codes.
- END of PROJECT Deliverable: Establish a residential baseline of building practices (typical insulation, fenestration, HVAC systems used, etc.) developed from stakeholder meetings.
- Develop and provide cost/benefit analysis of adoption of 2009 residential provisions compared to residential baseline.
- Develop and provide fact sheets and talking points for all the advantages of adopting the 2009 / 2007 codes.
- Develop and provide online resources for stakeholders supporting energy code adoption and implementation.

Hour Two:

Objective

Make the case for 2009/2007 energy code adoption among built community stakeholders.

- Discuss how local jurisdictions administer codes.
- Discuss process required by WV Fire Commission for code adoption by cities/counties
- Highlight cost-effective building energy efficiency technologies.

- Develop and provide fact sheets on energy codes savings for builders, consumers, rate payers.
- Develop a fact sheet on the cost of compliance (materials and labor).
- Discuss how to create a level playing field for builders.
- Develop a fact sheet on new and existing incentives for building in corporate limits.
- Discuss advantages of LEED-certified buildings and other advanced building programs supported statewide and locally.
- Target local concerns including:
 - o Capacity for implementation and enforcement
 - Alternative compliance opportunities and case studies to promote them (HERS –as-code-compliance, and any other third-party compliance.)

OPTIONAL SERVICES

Historically, industry-specific issues such as building codes and energy efficiency have not been considered topics of vital public interest, thus little public attention has been given to standards, training and education. However, West Virginia's critical position in the global energy market and rising energy costs within the state make these vital topics of interest to everyone.

These topics are critical to West Virginia's future. Every thinking citizen of West Virginia needs to become aware of his or her part in it. From young entrepreneurs thinking about career opportunities in West Virginia, to working contractors, to home owners, everyone has a stake in the energy future here. We aim to communicate on these subjects clearly and honestly.

Strongly recommended optional communication strategies include developing

- program/campaign branding and program identity package; targeted regional and statewide media relations and publicity support for the Building Energy Collaborative, regional meetings and outcomes; and
- electronic and hard-copy reference guides (based on 60 participants per regional meeting);
- focused professional outreach aimed at increasing diverse attendance at each meeting;
- three video public service announcements designed to air via Internet or television aimed at broadly communicating benefits of energy code adoption and energy-efficient building technologies.

Vendor Experience

WV GreenWorks, Inc. | Sarah Halstead Boland

Sarah Halstead Boland, a native West Virginian, returned to Charleston, WV from San Diego's workforce development community in 2006 to become a partner at Katalyst Development Strategies, LLC. Her background and experience in education and training program development complemented Katalyst's work in developing programs and communication strategies for sustainable community and economic development initiatives in West Virginia. Boland has recently been described as the state's *super advocate* for high performance building and sustainable industry and job development. She is an award-winning teacher and program developer, a skilled facilitator and instructional designer, and an expert on creating branded outreach strategies for large-scale public programs. She's dedicated to making sure West Virginians have access to best practices in green building and sustainability, and is deeply engaged in a number of statewide initiatives that build broad stakeholder support for transformational change.



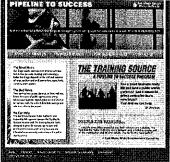




Boland is Executive Director and spokesperson for WV GreenWorks, Inc., and is a founding board member of the US Green Building Council – WV Chapter (USGBC – WV). Prior to the establishment of the USGBC – WV Chapter, she worked with a small group of dedicated professionals to establish BuildGreenWV, a statewide resource for general green building information. She has influenced the establishment of three local GreenDrinks chapters in West Virginia aimed at building social capital around the theme of sustainability. She advocates statewide for 2009 International Energy Conservation Code adoption, and recently worked with Thom Worlledge to provide information to the 2010 legislature on benefits of both high performance building and 2009 IECC adoption.

She organizes and facilitates public information sessions, community meetings, and media campaigns focusing on green building certification and high performance building standards. She arranges one-on-one meetings with municipal and legislative leaders when possible and necessary. WV GreenWorks offers RESNET Home Energy Rater certification prep courses statewide.

Boland is a founding member of the statewide initiative Create West Virginia.



She and her business partner Rebecca Kimmons designed six different presentations for the October, 2009 statewide conference in Huntington, WV. Presentation topics addressed historic preservation, adaptive reuse, the role of green schools in the community, and how to work with legislators to support community and economic development and featured a variety of subject matter

experts. Her presentations were among the highest rated of all conference sessions.

Working with the Employee Training Institute in San Diego, CA, Boland conceived and designed much of the award-winning training and public information sessions for the southern California contracting community. Boland was the architect for the Pipeline To Success program, which featured *The Training Source* as its information and training resource. *The Training Source* was voted the 2004 Exemplary Small Business Program

Initiative by the San Diego Supplier Development Council, and won a San Diego Union Tribune multi-cultural award in 2005.

The Training Source was designed to teach small contractors how to do business with public agencies and prime contractors, and to increase diverse small business participation in public agency construction contracting. Boland worked with public agencies to streamline administrative processes; with prime contractors to understand their needs regarding subcontractors' skills, experience and general knowledge; and with small contractors to educate owners, estimators, bidders, and project managers, teaching them how to work effectively with prime contractors. Boland collaborated with subject matter experts to research, design, brand, market and deliver a series of trainings and major networking events which deconstructed complex public agency contracting procedures. For the first time in the region's history, this process engaged diverse small businesses that otherwise would not have considered participating in public contracting.

McKinley and Associates | Thom Worlledge AIA, LEED AP, REFP



Thom Worlledge is an expert in sustainable design and is considered the state's industry expert on building codes, LEED certification, general sustainable building and community development practices, and low/high tech green building technologies. He has written articles on sustainable design published in national trade publications, spoken at a national conference of architectural students and American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE)

chapters, and has presented to business groups on sustainable design issues. He's been a voting member of the ASHRAE 90.1 National Energy Code Committee, and currently is Chair of the US Green Building Council – WV Chapter. He also teaches others the art of High Performance School Design as a professional trainer for the Sustainable Building Industries Council.

As an architect, he's been involved in design of projects ranging from small home

additions (one of which was featured on HGTV's New Spaces Show) to multimillion dollar projects such as consolidated high schools, state correctional centers and major additions to three of the state's VA hospitals.



He is currently designing three LEED projects and the first net-zero energy building in West Virginia. Highlights of Thom's qualifications for this project include:

- Led training workshop on ASHRAE 90.1- 2004 for 30 architects and engineers, Charleston WV, Spring 2004
- Provided High Performance Schools Training for the Sustainable Buildings Industries Council, Flatwoods West Virginia Fall 2005
- Presented at WV Conference on Smart Growth, Communities by Design, Martinsburg, WV October 2007
- Former member of American Society of Heating, Refrigerating, and Air Conditioning Engineers, (ASHRAE)
- Voting member of the ASHRAE 90.1 Energy code committee, 2005
- Past President of the West Virginia Chapter of the American Institute of Architects
- First LEED AP in the State of West Virginia
- High Performance School Trainer for the Sustainable Building Industries Council
- Recognized Educational Facilities Planner

Sarah

Workforce Training Program Development Communications Marketing

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4 Players Club Drive Charleston, WV 25311 s.halstead@katscandu.com 619.865.5132

xperienced executive leader, facilitator, communicator. Proficient with business, program, contract, and budget development relating to training, community and economic development initiatives.

Managing Partner: Katalyst Development Strategies, LLC

Executive Director: WV GreenWorks, Inc. Volunteer Organizer: BuildGreenWV Volunteer Organizer: USGBC – WV Chapter

Member: USGBC

Founding Member: Create West Virginia

Member: Sustainable Communities Team, Vision Shared

When it comes to West Virginia and economic, workforce, community and program development, Katalyst is uniquely positioned and dedicated to creating effective programs. We create systems, messages, images, public and media relations strategies, and brands in regional and national marketplaces for our clients. Katalyst is differentiated by our deep understanding and respect for West Virginia and its culture, history, people, and our insistent belief in our collective potential to redefine how West Virginia competes in the global economy.

Currently managing partner/owner of a woman-owned communications firm specializing in economic and workforce development, branding and product positioning in regional and national markets.

- 17 years' professional classroom instructional experience, curriculum development, and educational leadership.
- Eight years' experience in workforce and economic development and collaborative leadership for San Diego based high tech, defense, hospitality, biotech and tourism organizations
- Customized training program development for small, medium and large businesses
- Small business training and equal opportunity/diversity outreach expertise for defense contractors and public agencies with small business contracting opportunities
- Image/branding expertise including marketing, advertising, Web, media and public relations strategic planning and implementation

EXPERIENCE

2006 - present | Partner

KATALYST DEVELOPMENT STRATEGIES, LLC

Emphasis: Sustainable program and community development, enterprise strategic planning and communications.

Create and direct business-to-business and business-to-consumer communications, typically related to program, community, and workforce development initiatives. Create or direct creation of newsletters, print and electronic advertisements, print and electronic brochures, Web sites, news and information releases, and reports. Define target markets, map organization and program assets, create strategic plans, write copy, design surveys, facilitate focus groups and meetings. Specialize in packaging feature programs, corporate, service and community branding strategies, logo development, media and community relations.

10.2009 – present | Executive Director WEST VIRGINIA GREENWORKS, INC.

Emphasis: Supporting sustainable industry growth in WV through training, advocacy, and collaboration.

Research emerging sustainable industry trends and opportunities, workforce skills, training/educational resources, local and national policies that impact sustainable job growth, the environment, and the workplace. Match resources to community needs when possible, and create programs to address community needs when necessary. Strong emphasis on building public awareness of issues and opportunities. Areas of focus include: alternative/renewable energy, sustainable transportation, high performance building, sustainable agriculture, water management, sustainable tourism, air quality, land use and planning, sustainable forestry, and conservation.

01.2001 – 06.2008 | Program and Business Development SDCCD EMPLOYEE TRAINING INSTITUTE | SAN DIEGO, CA WORKPLACE LEARNING RESOURCE CENTER (WpLRC) Emphasis: Senior workforce development consultant and contract education business developer.

Responsible for all aspects of contract education business and program development, marketing and grant reporting. Designed large-scale incumbent worker training programs for small, medium and large corporations and public agencies. Designed needs, skills, language and organization assessments, facilitated DACUM job profiling workshops, staffed and managed short and long-term training projects. Expertise in curriculum development, instructional design, strategic planning and team building.

09.1990 - 06.2000 | Educator

U.S. Department of Defense, Japan and Okinawa; Beaufort, South Carolina; Winchester, Virginia; Boone County, West Virginia

Taught reading, writing, science, math, and social studies for grades kindergarten through eighth grade. After 10 years in public school classrooms in the US and with the Department of Defense overseas, I earned my Masters in Educational Administration and Leadership from United States International University, San Diego, and began a new career as a program and business developer for the Employee Training Institute.

RELEVANT SKILLS

Contract development Project management DACUM facilitation Copy writing/editing

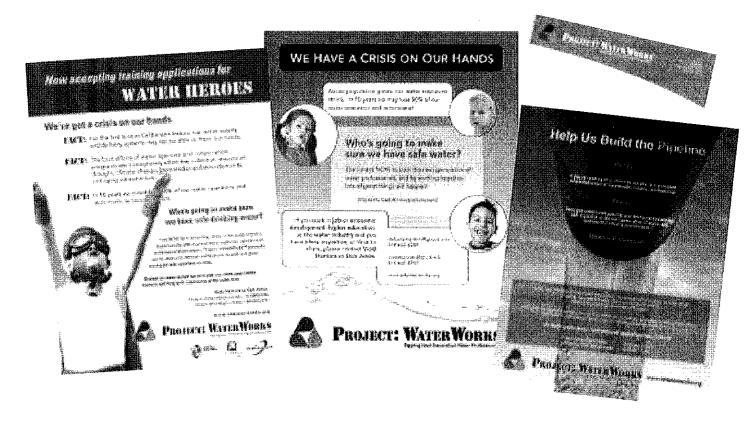
Electronic marketing Asset mapping Instructional design
Curriculum development
Organization assessment
Meeting facilitation

Budget creation and management Grant writing and reporting

EDUCATION

2000 MA Educational Leadership and Administration United States International University

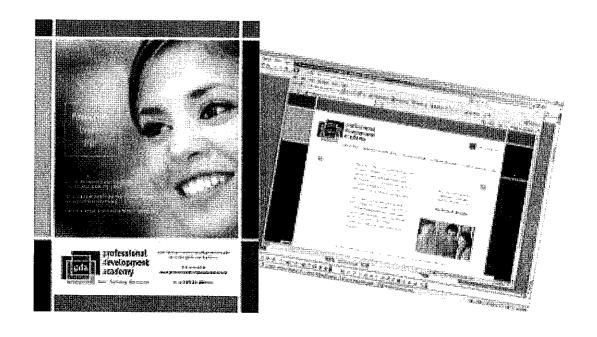
1990 BS Elementary Education, Multi-subject K-8 West Virginia State University



Cuyamaca/Palomar Water Training IDRC | Cuyamaca College Developed overall program branding, logo development, copy writing, Web site design and development. Developed brochures, one page recruiting flyers, electronic communications.

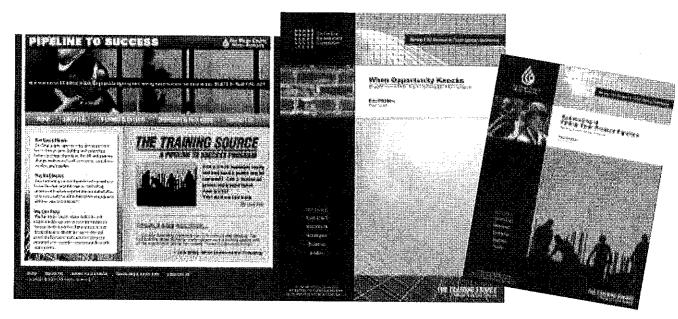


San Diego Military Education Program | San Diego City College Developed and designed new branding, brochure for Military Ed program. Designed tri-fold brochure to be used at national trade shows.



English at Work - IDRC | Cuyamaca College

Integrated English at Work and BusinessEssentials™ program information into existing PDA branding. Provided copy writing for posters, flyers, ads, a general brochure, and Web retrofitting.



Small Business Opportunities and Outreach Program | San Diego County Water Authority

Overall program conceptualization/collaboration, branding, marketing strategy, campaign design and management.



Employee Training Institute | San Diego Community College District San Diego Workplace Learning Resource Center

Repackaged all consulting and training services, advertising, authored Web site, multiple print and electronic campaigns.

Consulted with large and medium companies and public agencies to determine training and organization development needs. Designed customized training and contextualization services.



New River Gorge Preserve | Fayetteville, WV

Director of media relations, designed print and media campaigns, authored and redesigned Web site and all print collateral.

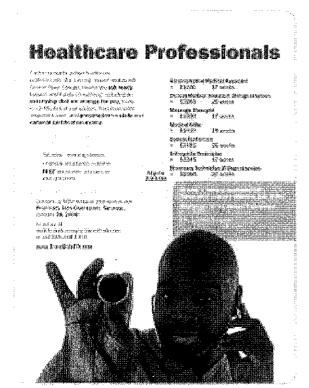






Class VI River Runners, Inc. | Fayetteville, WV

Designed and managed national writers' tours for top tier outdoor adventure company. Katalyst has acted as media relations director for more than 13 years.



Healthcare Career Training | SDCCD

Designed branding and outreach strategy, designed print ads, copy, banners, and electronic marketing campaign.

Current Thinking:

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Architect / Green (LEED) Specialist THOMAS R. WORLLEDGE, AIA, LEED AP, REFP

Charleston Office Area Manager



EDUCATION:

Virginia Polytechnic Institute & State University Master of Architecture - 1992

Fairmont State College, School of Technology B.S. Architectural Eng. Tech. - 1983

PROFESSIONAL AFFILIATIONS AND REGISTRATIONS:

Registered Architect in: West Virginia

west virginia Virginia Pennsylvania Ohio

National Board Certification:

NCARB #48600

President:

West Virginia Society of Architects

Member:

The American Institute of Architects
US Green Building Council
Sustainable Building Industries Council
Recognized Educational Facility Professional
(REFP)

Former voting member:

ASHRAE 90.1 International Energy Code Committee

PROFESSIONAL EMPLOYMENT:

McKinley & Associates
Manager, Charleston Office
Charleston, WV (2005 to present)

Proactive Architecture Inc. President Charleston, WV (1999-2005)

Silling Associates Inc.
Vice President
Charleston, WV (1992-1999)

TAG Architects Charleston, WV (1985-1990)

Alpha Associates Inc. Morgantown, WV (1983-1985)

SUMMARY OF EXPERIENCE:

Thomas R. Worlledge is a skilled Architect with over 20 years experience who has received state wide design awards and placed in national design competitions. As a recognized sustainable design expert, he has had articles published in state and national trade publications, spoken before architectural students, ASHRAE chapters, and business groups on sustainable design issues and was also a featured speaker at the 2001 Governor's Conference on the Environment and the 2001 Sustainable fair. He also teaches other design professionals in the art of High Performance School design, as a professional trainer for the Sustainable Building Industries Council. Mr. Worlledge has been involved in design of projects ranging in from a small home additions (one of which was featured on HGTV's New Spaces Show) to multimillion dollar projects such as Capitol High School, Mount Olive Correctional Center and Major Additions to three of the States VA Hospitals. Mr. Worlledge is a former voting member of the ASHRAE 90.1 Standards committee that forms the basis of the International Energy Code and is the president of the state chapter of the AIA,

NOTABLE PROFESSIONAL ACHIEVEMENTS:

High Performance Design for High Performance Companies

Published in Executive Source, Fall 2002

Watt's Next? The Coming Energy Revolution Published in West Virginia Executive, Winter 2004

The Design of Sustainable Environments
Featured Speaker, 1994 National Convention of
Architectural Students

Daylighting and HVAC Design Featured Speaker, ASHRAE West Virginia Chapter

Rebuilding the Future: Recycling and Reuse of Building Materials

Featured Speaker, 2001 Governor's Conference on the environment



RGQ# DEV1060 Energy Efficiency Trainer/Facilitator Attachment 1: Cost Sheet

The vendor must provide pricing inclusive of all associated costs for the following items including all travel costs and all other expenses. Unit cost must be provided per regional meeting.

Item No.	Description	Unit Cost	Estimated Qty	Extended Cost
1	Regional Meeting	\$4570.00	10	\$45,700.00
			Total Bid:	\$45,700.00

Fixed Price per Session - \$4,570.00

Includes

- Sarah Halstead Boland and Thom Worlledge co-designing and facilitating each session
- basic program branding
- research
- copy writing for fact sheets and other informational resources
- online repository, e-marketing to stakeholders and graphic support
- basic outreach in collaboration with Regional Planning and Development organizations
- transportation
- project coordination and management including provision of refreshments
- printing costs for a maximum of seven one-pagers for estimated 60 participants per session.

With Optional Services - \$7,000.00/session

Strongly recommended optional communication strategies include developing

- program/campaign branding and program identity package; targeted regional and statewide media relations and publicity support for the Building Energy Collaborative, regional meetings and outcomes; and
- electronic and hard-copy reference guides (based on 60 participants per regional meeting);
- focused professional outreach aimed at increasing diverse attendance at each meeting;
- three video public service announcements designed to air via Internet or television aimed at broadly communicating benefits of energy code adoption and energy-efficient building technologies.