

RFP: Consultant Services, Carbon Transition Planning Guide for Buildings

Issued: August 19, 2024
Submission Deadline: September 16, 2024
Reference: 24-032

Submit Proposals to:

Attn: Project Development and Research (PDR)

Format: PDF

Submission Details

All submissions responding to this request for proposal (RFP) must be emailed in PDF format to projects@cagbc.org no later than September 16, 2024, at 5:00 p.m. EDT.

Where no notice is given, the Canada Green Building Council (CAGBC) copyrights all information contained herein.

Submission questions

Interested Proponents can submit clarification questions related to this RFP by email to projects@cagbc.org up to and including August 30, 2024, 5:00 pm EDT.

In its sole discretion, CAGBC may choose to consolidate responses or not address submitted questions for any reason whatsoever.

Relationship of RFPs & Projects

This RFP is separate from, but part of the same project as, REALPAC's RFP: Carbon Transition Planning playbooks for Buildings. Proponents may bid on one or both RFPs. CAGBC and REALPAC will manage their respective RFPs and projects separately, but both projects will be closely aligned and governed by the same Advisory Panel.

Overview

The Canada Green Building Council (CAGBC) is a non-profit organization that collaborates with the building, real estate, finance, and government sectors to realize the value of green buildings. At CAGBC, we work with these interested parties to accelerate their sustainability efforts and mitigate climate change risks for new and existing buildings. As a member-driven organization, we provide the tools, training, research, and services to integrate sustainability, resilience, and carbon reductions into real estate decision-making.

CAGBC's project "Transition Planning: A Tool for Accelerating High Performance Building Codes Across Canada" has received funding from the Department of Natural Resources' Energy Efficiency Program under its "Codes Acceleration Fund." This project aims to identify regional considerations, needs and opportunities for reducing carbon emissions and improving energy efficiency related to existing buildings. It includes developing a Transition Planning Guide and a series of asset class-specific Transition Planning Playbooks, as well as providing capacity-building activities to support building owners and implementers in pursuing decarbonization of buildings.

Purpose

The Transition Planning Guide is a key deliverable in CAGBC's "Transition Planning" project. Transition plans, sometimes called decarbonization plans, outline how a building will adapt over time to remove combustion from building operations and minimize emissions. The Transition Planning Guide will serve as a tool to support private and public building owners in pursuing more significant carbon reductions in their assets by offering step-by-step directions, best practices, and relevant examples of transition planning. In this way, the Guide will support building owners' ability to meet the requirements of high-performance codes, regulations and programs. CAGBC has issued this Request for Proposals (RFP) to procure expertise to develop this comprehensive guide. This RFP invites qualified Proponents (including but not limited to independent practitioners, individual firms or joint ventures) to submit Proposals. CAGBC is seeking Proponents with extensive knowledge and experience in the following:

- Developing transition plans or related experience;
- Energy efficiency and decarbonization work on existing buildings;
- Applying the National Energy Code for Buildings (NECB);
- Applying high-performance building codes, regulations, and programs;
- Applying voluntary standards and frameworks for low-carbon and zero carbon buildings, such as CAGBC's Zero Carbon Building Standards (ZCB);
- Developing guides, frameworks, manuals, and/ or playbooks for diverse audiences, particularly in the building and energy sectors;
- Managing large-scale projects, particularly those involving multiple interested parties and complex deliverables.

The selected Proponent will lead the development of the Transition Planning Guide under the oversight of CAGBC.

Transition Planning Guide Objectives

The Transition Planning Guide shall address the following objectives:

- 1) **Where to start with transition planning and how to prioritize:** Outline the process and considerations for assessing and, importantly, prioritizing building retrofit opportunities within a portfolio, as well as how to start the transition planning process for a single asset.
- 2) **Establish a robust process:** Provide a framework for property owners to develop transition plans, including but not limited to factors influencing timelines, financial considerations and helpful partnerships.
- 3) **Enhance alignment with codes, regulations and programs:** Provide clear, actionable guidance and strategies to facilitate the alignment of existing buildings with high-performance building codes, regulations and programs (including voluntary standards).
- 4) **Support emission reductions:** Identify practical measures that drive significant reductions in building-related emissions.

Scope and Stages

The successful Proponent will lead the development of the Transition Planning Guide under the oversight of CAGBC. The Proponent's approach should follow the stages below, but they may be modified or expanded as deemed necessary. CAGBC shall approve progress on each stage before moving on to the subsequent stage.

The primary audience of the Transition Planning Guide is private and public property owners, and this perspective should be considered throughout the development process. However, much of the information in the Guide may also be useful for supporting team members such as consultants, contractors or facilities staff.

Stage One: Define the need

- Discuss with CAGBC the goals for the Transition Planning Guide.
- Review CAGBC's environmental scan of building codes, regulations and programs
- Define the industry consultation process whereby interested parties will be engaged and their feedback received to ensure the resulting Transition Planning Guide reflects the needs of relevant building owners and decision-makers and can reach audiences that have not yet initiated transition planning. This consultation may include any of the following:
 - Webinars or workshops
 - Interviews

- Surveys
- Engagement with industry organizations to reach their membership
- Define, together with CAGBC, the interested parties to be engaged, including but not limited to:
 - CAGBC's Codes Acceleration Fund (CAF) Advisory Group
 - Property owners with large, medium and small portfolios
 - Property owners of different asset classes (class A/B/C office, warehouse, retail, MURBs etc.)
 - Individuals or organizations with involvement in the development, adoption and compliance verification for codes, regulations and programs
 - Non-profits and community organizations in the real estate and/or decarbonization spheres
 - Implementers such as energy specialists, consultants and contractors with experience in delivering on decarbonization work
 - Relevant Indigenous individuals and organizations

Stage Two: Industry consultation and engagement with CAGBC's CAF Advisory Group

- Attend an introductory meeting with the Advisory Group to share the goals for the Transition Planning Guide and the proposed industry consultation process.
- Engage with industry as per the industry consultation process developed in Stage One.
- Periodically report to CAGBC on relevant feedback gained through the engagement with interested parties and the Advisory Group.

Stage Three: Development of the Transition Planning Guide

- Develop an outline for the Guide identifying main sections, chapters and subsections as well as a short summary of information to be included in each. This outline shall be approved by CAGBC before further development. Potential topics may include but are not limited to the following:
 - The importance of transition planning
 - Relevant codes, policies, and programs across jurisdictions and asset classes
 - Transition planning and building performance standards, with attention to how decarbonization may challenge cost-effective compliance and the need for flexibility in standards for buildings with robust transition plans
 - Benchmarking and understanding current building performance and emissions
 - Portfolio assessment and asset prioritization, including information needs
 - Target-setting for portfolio emission reductions, over the short and longer term
 - The scope of asset-level transition plans, including information needs and plan elements
 - Understanding energy sources and fuel switching
 - Considerations for the sequencing of measures

- Understanding the needs of tenants and other interested parties
- The financial assessment of transition planning alternatives
- Implementation of transition plans, including capital planning, design development, construction, and tracking progress
- Procurement and management of the transition planning team: consultants, contractors, facilities staff
- Available and recommended external tools, such as modeling software or benchmarking platforms
- Case studies of decarbonization projects representing a range of asset classes, geographical locations and property sizes
- Prepare a draft version of the Transition Planning Guide for review by CAGBC
- Present the draft version of the Guide to the CAF Advisory Group to solicit feedback
- Propose other tools and resources helpful to the transition planning process and how they would build on and support the Guide. Where these tools are not currently available, their development may be considered under a future scope of work. Tools and resources may include the following:
 - Checklists, such as to assist in planning or verifying compliance
 - Templates, such as for structuring transition plans, procuring transition plans, or facilitating ongoing building performance reporting
 - Tools for the financial assessment of transition plans
 - Simulation software, including recommendations of current products and suggestions to address any gaps in the market

Stage Four: Finalization of the Transition Planning Guide

- Finalize the language of the Transition Planning Guide for CAGBC's approval and CAF Advisory Group feedback
- Prepare an Executive Summary of the Guide
- Meet with CAGBC to discuss the graphic design of the Guide to ensure consistency with CAGBC's style guide and other CAGBC publications
- Finalize the publication-ready version of the Transition Planning Guide following review by CAGBC and the CAF Advisory Group

Requirements of Proponent

The expected minimum level of skill, knowledge, and experience of the Proponent include:

- 1) **Technical expertise:** a minimum of five (5) years of experience in consulting, building code development, energy efficiency, and/ or sustainability. A background in architecture, engineering, energy and/ or real estate is considered an asset
- 2) **Transition planning and decarbonization experience:** relevant experience in working with decarbonization projects and/ or transition planning

- 3) **Retrofit experience:** relevant experience in working with the retrofitting of existing building projects, particularly with a focus of improving energy efficiency and performance
- 4) **Content development expertise:** experience in developing guides and frameworks, manuals, and/ or playbooks for diverse audiences, particularly in the building and energy sectors
- 5) **Project management experience:** Excellent skills in project management, including planning, execution, and monitoring, as well as strong communication, facilitation, and interpersonal skills
- 6) **Facilitation experience:** experience in leading a collaborative process with groups of participants, guiding discussion, ensuring broad engagement of all parties and effectively summarizing the group's feedback

Assumptions and Constraints

CAGBC may choose to engage with the successful Proponent based on the hourly rates submitted through the RFP on delivery of the Transition Planning Guide. Proponents will be asked to submit a detailed proposal using the Excel sheet provided as Appendix B.

Terms and Conditions

1. Information provided throughout the application process will be treated as confidential by CAGBC
2. Upon award, the successful Proponent will be retained using CAGBC's master service agreement
3. All information, recommendations and reports will become the exclusive property of CAGBC. Proponents should be prepared to provide copyright to CAGBC of any materials used and created during the term of the agreement.
4. The CAGBC is not bound to choose any of the submitted Proponents.
5. The successful Proponent may be required to sign a Conflict of Interest and Non-Disclosure agreement at CAGBC's discretion.
6. Key success factors include on-time and on-budget delivery, responsiveness, and approval of the quality of work from CAGBC senior management.

Key Dates

CAGBC reserves the right to adjust these dates at its sole discretion.

- Requests for Proposals Issue Date – August 19, 2024
- Deadline for Questions – August 30, 2024, 5 pm ET
- Deadline for Addenda – September 6, 2024, 5 pm ET
- Submission Deadline – **September 16, 2024, 5 pm ET**
- Anticipated Date to notify the contract awarding party – October 4, 2024, 5 pm ET

Submission Structure and Evaluation Criteria

The selection process will be based on a balance of criteria, including expertise, experience, and cost.

Submission Format

Submissions are to include the following three components:

1. **RFP Proposal Submission Form** (Appendix A, two (2) pages).
2. **Technical Proposal** (a maximum of nine (9) pages, not including CVs for team members. Please submit the proposal as a single PDF file):
 - a. **Section A - Executive summary** (1 page maximum): Provide the Proponent's firm's background, including the following:
 - i. Introduction and a brief history, including the year the business/organization was established.
 - ii. Core competencies and services delivered by the Proponent.
 - iii. Description of customer service approach and project management processes.
 - b. **Section B- Qualifications** (5 pages maximum, not including CVs for team members):
 - i. Provide summaries of two (2) relevant projects completed in the last 5 years.
 - ii. Provide three (3) appropriate references.
 - iii. Demonstrate ability to perform the stated scope at the highest level based on past experience and approach
 - iv. Describe the resourcing approach, including:
 - Curriculum vitae for each named Team Lead and proposed Key Team Members, demonstrating their qualifications and experience in the proposed roles, as well as the levels for which they are proposed.
 - The reporting relationship between all team members. (Team Lead and all Key Team members).
 - c. **Section C – Functional Approach** (3 pages maximum)
 - i. Workplan – Present a workplan on how the services will be delivered, referencing the scope and stages section of the RFP, and describing how the Proponent plans to perform based on its experience. Include:
 - An overview of the ability to meet the project deliverables
 - An outline of how each stage of the scope of work will be achieved
 - A timeline to complete each stage, including primary milestones for necessary signoff to advance the scope of work

- Anticipated contribution from CAGBC staff for all stages
 - ii. Communications and Reporting - Describe how the deliverables will be communicated to CAGBC and the frequency of status updates during the delivery of the Services.
3. **Financial Proposal** (Excel file provided as Appendix B):
- a. Roles and hourly rates for each team member.
 - b. Detailed budget for each stage/phase of the project, showing the method and basis of compensation.

Proposal Evaluation Criteria

CAGBC will evaluate all submissions using the following weighted system:

Stage 1: Mandatory Submission Requirements	(Pass/Fail)
<i>Proponents must receive a PASS in Stage 1 to proceed to Stage 2.</i>	
<i>To receive a PASS in this evaluation stage, the Proponent's Proposal must be complete and compliant with the Mandatory Submission Requirements below.</i>	
1. RFP Proposal Submission Form	
Submission File 1: RFP Proposal Submission Form (satisfactorily completed and signed, presenting no risks to CAGBC). See Appendix A.	Pass
2. Technical Proposal	
Submission File 2: Technical Proposal – File 1 must include the submission requirements for Stage 1 and Stage 2.	Pass
Important: The Technical Proposal File 1 – Must <u>not</u> contain Financial Proposal pricing information or the Proponent's Proposal will be disqualified.	
The Technical Proposal is not to exceed 9 pages, <u>excluding</u> the cover page, table of contents and CVs of the project team members.	
3. Financial Proposal	
Submission File 3: Financial Proposal – must be submitted using Appendix B.	Pass
Stage 2: Technical and Financial Proposal Evaluation	(100%)
Section A: Executive Summary	10%
A1: Provide the Proponent's firm background, including the following: <ol style="list-style-type: none"> a) Introduction and a brief history, including the year the business/organization was established. b) Core competencies and services delivered by the Proponent. c) Description of customer service approach and project management processes 	
Please note:	

<p>If the delivery of the Services will involve the use of <u>subcontractors</u> or if the Proposal is presented as a potential <u>joint venture</u> or <u>partnership</u> between two or more partners or companies, then please provide the information requested from this section for ALL/ANY related parties:</p> <p>Failure to do so, where applicable, will result in a lower score.</p>	
<p>Section B: Qualifications</p>	<p>25%</p>
<p>B1: Demonstrate considerable direct expertise with similar projects.</p>	
<p>B2: Provide summaries of two (2) relevant projects completed in the last 5 years.</p>	
<p>B3: Provide three (3) appropriate references.</p>	
<p>B4: Demonstrate ability to perform the stated scope at the highest level.</p>	
<p>B5: Describe the resourcing approach, including:</p> <ul style="list-style-type: none"> a) Curriculum vitae for each named Team Lead and proposed Key Team Members, demonstrating their qualifications and experience in the proposed roles, as well as the levels for which they are proposed. b) The reporting relationship between all team members. (Team Lead and all Key Team members) <p><i>*Please note the following role and role level guidance:</i> <i>Junior = a minimum of 1-3 years of experience delivering the Service</i> <i>Intermediate = a minimum of 4-9 years of experience delivering the Service</i> <i>Senior = a minimum of 10+ years of experience delivering the Service</i></p>	
<p>Section C: Functional Approach</p>	<p>25%</p>
<p>C1: Workplan – Present a workplan on how the Services will be delivered, referencing the Scope and Stages section of the RFP, and describing how the Proponent plans to perform based on its experience. Include:</p> <ul style="list-style-type: none"> a) An overview on the ability to meet the project deliverables b) An outline of how each stage of the scope of work will be achieved c) A timeline to complete each stage, including primary milestones for necessary signoff to advance the scope of work d) Anticipated contribution from CAGBC staff for all stages 	
<p>C2: Communications and Reporting - Describe how the deliverables will be communicated to CAGBC and the frequency of status updates during the delivery of the Services.</p>	
<p>C3: Quality Control - Describe the quality control plan that will be used to monitor and deliver the Services scope successfully.</p>	
<p>Section D: Project Cost (in Excel format)</p>	<p>40%</p>
<p>D1: Summary of overall cost per stage/phase of the project.</p>	
<p>D2: Roles and Hourly Rates for all Team Members</p>	

<p>D3: Detailed budget for each stage/phase of the project, showing the method and basis of compensation. For each stage include:</p> <ul style="list-style-type: none"> a) Details of the services, hours, and fee rates b) Details for any additional costs, such as transportation, accommodation, per diem, anticipated for the delivery of the scope of work 	
<p>Stage 3: Consensus Ranking</p>	<p>100</p>
<p>For Proponents that satisfy all mandatory and minimum scoring threshold requirements, their technical scores will be evaluated by the review committee. A list ranking all Proponents will be generated based on their respective total scores.</p>	<p>100</p>

CAGBC is excited to partner with a consultant who will help us achieve our goal of accelerating the adoption of high-performance building codes across Canada. We look forward to receiving your proposal.