BOMA BEST
BUILDING CERTIFICATION PROGRAM

2024 National Green Building Report Request for Proposal

Proposal Deadline	Friday, April 12, 2024, at 5pm EDT
Contract Start Date	Monday, May 6, 2024
Date for Completion of Work – Key Findings	Monday, July 15, 2024
Date for Completion of Work – Final Report	Friday, August 16, 2024

Send proposal and questions to Maryluz Velasco at mvelasco@bomacanada.ca

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Contents

1. About the Organization

Launched in 2005, BOMA BEST is Canada's largest environmental assessment and certification program for existing buildings. With over 4,000 active certifications worldwide, it is a unique, voluntary program designed by industry for industry; it provides owners and managers with a consistent framework for assessing the environmental performance and management of existing buildings of all sizes.

BOMA BEST Sustainable Buildings certification recognizes excellence in energy and environmental management and performance in commercial real estate. The Program is managed by the Building Owners and Managers Association of Canada (BOMA Canada).

2. Project Overview

Since 2009, BOMA Canada has released a National Green Building Report (NGBR). This report summarizes the performance of buildings that certified with BOMA BEST within a given period, typically 12 months, and provides insights on trends and topics of interest. In the last few years, the report format has changed. It first started as a single long document containing over 50 figures and accompanying observations and then changed to two documents: Key Findings and Technical Report. In the latest iteration, the report is now a hybrid of the Key Findings and Technical Report combining thoughtful statistics and stories for owners and building managers to relate to.

BOMA Canada is looking for a partner to perform the technical analysis of the BOMA BEST data gathered during a specified period, identify the findings and necessary observations, and draft the 2024 National Green Building Report.

Our more recent NGBRs can be found on our website here: https://bomabest.org/publications-and-ngbr/

3. Project Description and Requirements

The 2024 BOMA BEST National Green Building Report will consist of the following components:

1. The Key Findings:
    - Typical audience: Portfolio managers, senior sustainability officers, building managers. Should appeal to a large stakeholder group, going beyond those typically interested in data analysis and should be easily understood by all readers, regardless of level of experience with the program or data analysis literacy skills.
    - Highlights standout observations in a graphic rich format including infographics, case studies and building images.
    - Will be used as a promotional piece for the program and therefore should clearly highlight the best and most interesting findings from the buildings in the sample set, providing clear observations, using compelling language.

2. The Technical Aspect:
    - Typical audience: Consultants seeking to benchmark client buildings, engineers, building operators.
    - In conjunction to the Key Findings, it provides a more granular analysis of the sample's performance across all assessment categories.

The analysis will be based on the data from buildings who submitted for verified in BOMA BEST 3.0 between January 1st, 2023, and December 31st, 2023. All buildings will have completed their certification in the BOMA BEST 3.0 questionnaires and will represent buildings in Canada and in the US. Noting this will be the final year where BOMA Canada will analyze BOMA BEST 3.0 submissions. The successful applicant will perform the analysis, identify the compelling findings and potential stories, compile case studies, draft all required observations, and finally, draft the National Green Building Report. BOMA Canada will design the final layout.

The property types that should be included in the analysis are Office, Light Industrial, Open-Air Retail, Universal, Enclosed Shopping Center, MURB and Health Care (dependent on sample size).

The NGBR will be launched at our annual conference BOMEX 2024, on September 23, 2024.

Project Deliverables and Scope

BOMA Canada proposes to divide the project into three (3) phases of work:

1. Kick off Meeting, Data Analysis, and Identification of Potential Case Studies.
2. Draft of case studies, key findings and stories based on the interesting values pulled from the data analysis.
3. Finalizing the NGBR.

Phase 1: Kick off Meeting, Data Analysis, and Identification of Potential Case Studies

BOMA Canada and the successful partner will have a kick-off meeting (90 Minutes) to discuss the deliverables, scopes, suggestions, budget, timelines, etc. This meeting will ensure that all parties have aligned objectives and expectations.

Following this meeting, BOMA Canada will provide the successful partner with the BOMA BEST Data set. This data set will take the following form:

- 1x Excel spreadsheet summarizing all the buildings (Portfolio and Single Stream) that certified in the specified period
- 6x Excel spreadsheet providing the answer (Yes/No/N/A) on every single question for every property type (one Excel per property type since the question order changes per questionnaire type)
    - Office
    - Light Industrial / Open Air Retail (these are provided on a combined spreadsheet since they use the same questionnaire)
    - Enclosed Shopping Center
    - Universal
    - MURB
    - Health Care

- 6 x Excel spreadsheet providing the exact score on every single question for every property type
- 1x Excel spreadsheet providing detailed meter information for every single property in the sample set that has provided an EUI or ENERGY STAR Score – for the purposes of calculating GHG intensity
- Any other documents that the successful partner deems necessary to complete the analysis

In addition to the above, BOMA Canada will provide the partner with formatting specifications (e.g. always ordering the property types in the same way across all figures, etc.) to enhance reading clarity.

The successful partner will take the steps required to ensure the data is clean and reliable. Any erroneous results should be discussed with BOMA Canada. A high quality of data and accuracy of data must be maintained throughout to preserve the reader's trust in the process.

The successful partner will analyse the data for areas of interest and will create the expected Figures and Tables. Consult **Appendix A** for the List of Figures and Tables from the 2021 Technical Report. The same figures and tables are expected in the 2024 NGBR.

BOMA Canada welcomes change and is eager for new ideas. If the successful partner wishes to deviate from this typical list, this must be discussed with BOMA Canada. Some figures are necessary (e.g. Overall number of certifications) however others could certainly be removed, replaced by others.

Units presented must be commonly used and understood across Canada and the US and applied consistently throughout. Though certain units have been used previously (e.g. ekWh/ft2/yr) BOMA Canada welcomes the partner's opinion on the most appropriate unit that should be used (for example, deviating ekWh/ft2/yr since the Online Portal reports EUI in GJ/m2/yr).

Phase 1 Deliverables:

- Draft "Technical Analysis Report" in MS Word. This document should include all figures and tables listed in Appendix A of this RFP in addition to any newly discussed figures. No observations are required for this document (e.g. "there is a decrease in performance since last year"). The purpose of this Technical Analysis Report is to ensure that all aspects of the analysis have been completed ensuring that the successful partner can identify the figures and trends that are the most compelling and therefore should be featured in the Key Findings.
- Clearly identify what external data sources will be used to make performance comparisons with BOMA BEST buildings (e.g. if comparing BOMA BEST Office EUI against the NRCan national average –which value and year should be used and why?)
- MS Word document identifying the most compelling figures, findings, and case studies – to be reviewed with BOMA Canada in Phase 2.

Phase 2: Review Meeting and Final Key Findings

BOMA Canada and the successful partner will meet again to review the successful partners' suggestions for the Key Findings and Case Studies.

Prior to this meeting BOMA Canada will have held internal discussions on the types of stories that we think might be interesting to include in the Key Findings. These will also have been communicated to the successful partner prior to the Review Meeting. Nevertheless, BOMA Canada depends on the successful partner to provide their opinion, based on the analysis and the global context, of the areas of interest and propose language for expressing these findings. For example, perhaps Scope 1 and 2 emissions should take a more prominent role due to increasing efforts towards Canada's 2050 net-zero emission goal or other global goals. The partner's professional technical insights are extremely valuable and appreciated.

The outcome of this meeting will be a short list (perhaps about 10) of interesting findings which will form the Key Findings of the report. The partner will draft the Key Findings, consisting of the top findings and associated observations.

BOMA Canada welcomes and expects the successful partner to provide some insight and suggestions on any improvements or innovations that can be made to the Key Findings and/or technical aspect of the Report to make it even more compelling to readers.

Phase 2 Deliverables:

- Final Key Findings and Case Studies in MS Word. The document will be laid out in a way that provides BOMA Canada with all needed information: organization of all sections, titles of sections, figures, and observations written using compelling and easy to understand language.
- MS Excel file that includes all the values and layout information necessary for our designer to recreate all the figures. The figures and their values must be presented in a way that uses consistent language and formatting (to be specified by BOMA Canada in kick-off meeting).
- Tables that specifically outline the energy savings difference (ekWh/ft^2/year), cost savings difference ($/yr) and cost savings per ft^2 ($/$ft^2$) for Silver, Gold and Platinum certified buildings compared to the selected external national average. The assumptions required to calculate them must also be included (e.g. estimated average cost per kWh based on estimated average fuel mix). An equivalent table is also necessary for Water. If Waste can be quantified in a way that makes financial savings possible, this is also desirable. Though these tables will not be included in the Key Findings, this information will allow BOMA Canada to create infographics highlighting the buildings' performance, these will be included in the Key Findings. An example of the 2021 tables for energy and water (and associated assumptions) are provided below.

Table 1: Energy Savings for Offices by Certification Level (Compared to National Average EUI)

CERTIFICATION LEVEL	ENERGY SAVINGS ($EKWH/FT^2/YR$)	COST SAVINGS PER FT^2 ($\$/FT^2/YR$)
Gold	2.5	$ 0.20
Platinum	0.8	$ 0.06

Table 2: Water Savings for Offices by Certification Level (Compared to National Average WUI)

CERTIFICATION LEVEL	WATER SAVINGS ($M^3/M^2/YR$)	COST SAVINGS PER M^2 ($\$/M^2/YR$)
Silver	0.09	$ 0.21
Gold	0.30	$ 0.74
Platinum	0.43	$ 1.04

Phase 3: Finalizing Technical Report

BOMA Canada will return to the draft technical report and provide comments or questions to the partner. The document will be updated as needed by the partner. BOMA Canada will finalize it and release it.

Phase 3 Deliverables:

- Final NGBR in MS Word. The following sections must be included in the report:
  - Analysis of data (Figures and Tables) laid out in a manner proposed by Partner
  - Methodology
  - List of acronyms
  - List of Figures
  - List of Tables
- MS Excel file that includes all the values and layout information necessary for our designer to recreate all the figures. The figures and their values must be presented in a way that uses consistent language and formatting (to be specified by BOMA Canada in kick-off meeting).
- MS Excel file that has been cleaned up to include the answers and scores of ONLY the buildings that were included in the final analysis. This is needed in case BOMA Canada must dive into the data set to analyze a question (or a sub-sample) that wasn't included in the original report. We wish to have a record of the final data set that was kept after the successful partner analyzed it to exclude outliers, etc.
- Corrections as needed (once NGBR have been issued): if an instance is found where values stated were incorrect, BOMA Canada will notify the partner who will re-review values stated throughout the reports (including to any dependent values) and make the corrections in the MS Word **and** MS Excel files. Ideally, no corrections will be necessary since the NGBR will already be printed and we do not want to erode the reader's trust in the analysis.

4. Considerations

- Recent NGBRs can be downloaded here: https://bomabest.org/publications-and-ngbr/
- BOMA Canada wishes to hold the kick-off meeting on May 8, 2024 from 10:00 – 11:30am EDT with the successful partner. This date can be negotiated based on the partner's availability though it should ideally be soon before or after this date.
- As much as possible, the partner must provide the same types of figures and tables as provided in the 2021 NGBR. If the partner recommends that new figures should be included, these will absolutely be considered by BOMA Canada. The partner is also welcome to propose new layouts, formats or ways of representing the data to be more compelling.
- BOMA Canada wishes to significantly increase its analysis of buildings' carbon intensity in this report. More figures must be included on this topic.
- BOMA Canada wishes to also expand its analysis to include it's certified US buildings. And encourages the successful partner to look into findings from a regional perspective (our eleven local associations)
- The analysis should include all property types where applicable and if the sample size permits.
- MURB and Health Care use a version of the questionnaire (category organization and questions) that is different from the other 5 property types (Office, Light Industrial, Open Air Retail, Enclosed Shopping Center, Universal). As such, it may be necessary to display their results differently.
- There are two streams, Single and Portfolio. Both are assessed using the same questionnaire (based on building type) but only some Portfolio Buildings are actually verified by a third party. Only verified data will be included in the detailed analysis of building performance. Nevertheless, the un-verified certified Portfolio Buildings must still be included in the figures presenting an overview of all certifications obtained during the analysis period and other relevant figures (e.g. number of certified buildings by level, etc.) BOMA Canada will provide clarity around which buildings are specifically part of the verified set.
- The partner must explore the global context to identify a comparison metrics against which BOMA BEST data should be analysed – for example, which figure should be used as the external national average for water or energy.
- As much as possible, the partner should use the same methodology when identifying data outliers as provided in previous years (consult **Appendix B** for the Methodology Section from the 2021 Technical Report). If a new methodology is proposed and agreed upon, this should be explicitly described to our readers.

5. Timelines

BOMA Canada proposes the following timeline:

RFP issued by BOMA Canada	Friday, March 29, 2024
Deadline to submit inquiries	Friday, April 5, 2024
Proposal deadline	Friday April 12, 2024 at 5pm EDT
BOMA Canada requests for clarity and telephone interviews with candidates (as necessary)	April 24-25, 2024
BOMA Canada selection deadline and communication with successful partner	Friday, May 3, 2024
Kick-off meeting between BOMA Canada and successful partner; negotiations of final contract	Wednesday, May 8, 2024 @ 10am - 2pm EDT (subject to candidate availability)
BOMA Canada to provide all data to successful partner	Thursday, May 9, 2024
BOMA Canada notifies all unsuccessful candidates	Monday, May 13, 2024
Present Key Findings and Case Studies	June 17-21, 2024
First Draft of NGBR due	Monday July 15, 2024
Feedback from BOMA Canada to Consultant	Monday, July 29, 2024
Final Draft of NGBR due	Friday, August 16, 2024

6. RFP Submission Requirements

Provide a detailed response that demonstrates the potential partner's understanding of the requirements and challenges contained in this Request for Proposal. At a minimum, BOMA Canada will be reviewing proposals for the following:

1. Experience and qualifications of the proposed team members.
2. The method and approach to be used to meet the requirements. We'd love to hear about the potential partner's vision for the work as well as identifying any challenges it might contain.
3. The technical expertise to produce the services identified in the *Deliverables and Scope*.
4. Suggestions for innovative approaches and ideas (on data interpretation, delivery ideas, format, etc.).
5. Confirmation that the potential partner can meet the project timelines.
6. A budget based on the deliverables outlined in the *Deliverables and Scope*. If optional items are proposed (for example, based on the innovative suggestions), these should be itemized with a proposed budget. The costs shown will be considered as the upper limit for the individual items and will not be exceeded unless written approval is given by BOMA Canada.

The candidate recognizes that all deliverables will be the sole property of BOMA Canada and may not be used by the successful partner for any other purposes without the explicit permission of BOMA Canada.

7. Scoring Criteria

The scoring table below provides an outline of the scoring criteria as well as the weight applied to each criterion. Each item will be scored on a scale of 1 - 10 where 1 means “poor” and 10 means “excellent”.

In addition to ensuring the right organizational fit, BOMA Canada will be using the following criteria and weighting to identify the successful partner.

Qualitative Attributes			
Project Team & Experience	Familiarity with the BOMA BEST assessment and how it differentiates across each property type	5%	50%
	Individual team member experience and ability to contribute to the project	5%	
	Practical and technical experience performing statistical analysis and trend analysis from a broad set of data (for example, across each of the 10 BOMA BEST assessment categories: Energy, Water, Air, Comfort, Health and Wellness, Purchasing, Custodial, Waste, Site, Stakeholder Engagement)	25%	
	Practical and technical experience writing reports outlining statistical data and trends in easy-to-understand language	15%	
Response to the RFP	The method and approach used to meet the requirements of the *Deliverables and Scope*	25%	50%
	Innovative approaches and ideas (on data interpretation, delivery ideas, format, etc.).	15%	
	High level project schedule demonstrating that the work can be completed in time with the requirements	10%	
Sub-Total			100%
Qualitative Attributes			70%
Proposed Budget			30%
TOTAL WEIGHTED SCORE			100%

Final scores will not be shared with candidates.

8. Contact Information

Please contact Maryluz Velasco with any questions prior to the Proposal Deadline date of the RFP.

- mvelasco@bomacanada.ca

Submissions must be in an electronic format and emailed to mvelasco@bomacanada.ca

10. APPENDIX A: List of Figures and Tables from 2021 NGBR

11. APPENDIX B: Methodology from 2021 NRBG

Analysis period and general notes

The 2021 National Green Building Report (NGBR) includes certifications awarded between April 1, 2019 and March 31, 2020. For ease of reference, buildings analyzed in this report are simply referred to as the “2019” data set.

All buildings included in this report completed the BOMA BEST 3.0 assessment.

Light Industrial and Open Air Retail property types are reported as a combined property type; therefore, their reported performance is an average of all Light Industrial and Open Air Retail buildings. The combined property type is noted as Light Industrial / Open Air Retail throughout the report.

In this report, the term “*Certified*” (with capital “C” and italicized) refers to the BOMA BEST certification level of the same name – Certified, i.e., a score of 0 – 19%. In this report the term “certified” (not capitalized) refers to all buildings that achieved BOMA BEST certification (irrespective of the certification level achieved).

Unless specifically stated, changes to percentage scores discussed in this report are absolute, and not relative. For example, a change in score of 78% to 80% would be calculated as "80% minus 78%" and reported as +2%. This is consistent with reporting in previous years.

The percentages in some charts may not add up to 100% due to rounding.

Analysis Inclusion Requirements

The "Active Certifications" section includes all 755 buildings certified within the period of April 1, 2019, to March 31, 2020.

The detailed performance analysis "Scores & Performance" and "Performance by Property Type" sections include only the 278 buildings that met all of the following criteria:

1. Certified between April 1, 2019 and March 31, 2020
2. Achieved a score of 20% or higher (*Bronze, Silver, Gold, Platinum*, but not *Certified*)
3. Were verified in the current year (only 20% of buildings in the Portfolio Stream are verified each year)

At a regional level for a given property type, if fewer than 5 buildings achieved *Bronze* or higher level of certification, performance results were not reported and "insufficient data" is indicated when possible.

Table 22 outlines the number of buildings at each certification level and property type that were included in the performance analysis.

Table 3: Number of Buildings Included in the Performance Analysis, by Level and Property Type

	PLATINUM	GOLD	SILVER	BRONZE	TOTAL
Office	19	103	125	12	259
Universal	5	20	27	2	54
Enclosed Shopping Centre	7	13	8	1	29
Light Industrial & Open Air Retail	1	5	74	36	116
Grand Total	32	141	234	51	458

Performance Analysis

Energy use intensity (EUI) results consider 214 of the 259 office buildings that achieved Bronze and higher (Certified level buildings are excluded), filtered to meet the following criteria:

1. Exclude entries with no EUI data, or no entered value
2. Exclude statistical outliers: EUI values greater than 200 ekWh/ft²/yr or lower than 10 ekWh/ft²/yr

Water use intensity (WUI) results consider 197 of the 259 office buildings that achieved Bronze and higher (Certified level buildings are excluded), filtered to meet the following criteria:

1. Exclude entries with no WUI data, or no entered value

2. Exclude statistical outliers: WUI values greater than 5 $m^3/m^2/yr$ or lower than 0.1 $m^3/m^2/yr$
3. Exclude entries with inconsistent WUI value and WUI range

Greenhouse Gas intensity (GHGI) results consider 58 of the 259 office buildings that achieved Bronze and higher (Certified level buildings are excluded), filtered to meet the following criteria:

1. Buildings with reasonable EUI (10 – 200 $ekWh/ft^2/yr$)
2. The difference between BOMA EUI and ENERGY STAR EUI is within +/- 15%
3. Weather Normalized Site Natural Gas Intensity ($ekWh/ft^2$) and Electricity Intensity (kWh/ft^2) are available

Greenhouse gas intensity data was calculated using electricity and natural gas use intensity reported on ENERGY STAR, converted with emission factors.