



**BOMA Deep Retrofit Challenge  
Program Administration Service  
Provider RFP**

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# 1. Introduction and Background

## 1.1 Overview of BOMA Canada

The Building Owners and Managers Association (BOMA) Canada is a national not-for-profit organization representing the interests of the Canadian commercial real estate industry. With a history spanning over a century, BOMA Canada has been at the forefront of promoting best practices, advocating for the industry, and driving sustainability and energy efficiency in the built environment. BOMA Canada's membership comprises building owners, managers, developers, facilities managers, asset managers, and industry service providers, representing a significant portion of the country's commercial real estate sector. BOMA develops and delivers programs and initiatives to advance better building performance, operational excellence, and emission reduction. BOMA also facilitates exchange of ideas and management best practices that support our member associations in the areas of professional development, advocacy and building environment management programs (BOMA BEST®).

## 1.2 Deep Retrofit Accelerator Initiative (DRAI)

In March 2022, the Government of Canada released its 2030 Emissions Reduction Plan (ERP) – the first under the Canadian Net-Zero Emissions Accountability Act. The road map outlines a sector-by-sector path for Canada to reach its emissions reduction target of 40 to 45 percent below 2005 levels by 2030 and net-zero emissions by 2050.

To meet its climate targets, the Government of Canada recognizes the need to increase the depth and rate of building retrofits. Retrofits, especially deep retrofits, are complex projects with many moving parts – from project pre-development to financing and project implementation – and involve many players. This complexity generates barriers to the development of deep retrofit projects across Canada.

A new type of organization has been emerging in Canada to help address these challenges. These organizations (i.e. retrofit accelerators) convene and coordinate retrofit actors, support building owners through the deep retrofit process, and drive market transformation in a given region or market segment.

Accordingly, the government released a [Deep Retrofit Accelerator Initiative](#). The Deep Retrofit Accelerator Initiative (DRAI) provides funding to organizations (i.e. “retrofit accelerators”) that help building owners in the development of deep retrofits in commercial, institutional, and mid- or high-rise multi-unit residential buildings in Canada, and that drive market transformation in a given region or market segment.

The objectives of the DRAI program are to:

- build capacity for, and address barriers to, deep retrofit project development and implementation
- facilitate the development of deep retrofit projects in Canada
- contribute to transforming the buildings sector in support of the Government of Canada's climate goals

The term of the DRAI program is 3 years, ending in March 2027. Details of the purpose and eligibility along with other additional details, are provided within the program application guide.

The program application guide is available on the NRCan website at <https://natural-resources.canada.ca/energy-efficiency/buildings/deep-retrofit-accelerator-initiative/deep-retrofit-accelerator-initiative-application-guide/24923>.

DRAI includes four program elements (also referred to as Tasks in the DRAI Program Guide):

1. **Aggregation:**  
Identifying and/or aggregating deep retrofit projects. - This includes activities towards identifying and/or aggregating deep retrofit projects that may span a large number of buildings across a given geographic area or market segment.
2. **Funding & Financing:**  
Identifying available funding and financing for specific deep retrofit projects. This includes activities towards supporting building owners as they seek public and private sources of funding and financing (including but not limited to banks, utilities, government departments and agencies, crown corporations, retrofit lenders, and other entities).
3. **Guiding Building Owners:**  
Guiding individual building owners in the process of developing and implementing specific deep retrofit projects.
4. **Capacity Building:**  
Conducting capacity building activities, such as developing or implementing novel, standardized, or replicable approaches to deep retrofits.

Eligible activities (hereinafter referred to as Activity or Activities in this RFP) under the four Tasks include the following:

	Activity	Description
1	Energy or carbon audits/assessments	Energy performance analysis, identification, recommendations or coordination of measures, aggregation potential, maximizing electrification or carbon reduction potential, etc.
2	Development of business Case/plans/proposals	Development of business cases for various audiences (owners or shareholders, financiers, tenants, etc.), proposal development facilitation
3	Project Management activities.	Development of project plans that emphasize a holistic approach to retrofits, which may include work plans for: procurement, project design, integrated design charrettes, project management and administration, etc.
4	Development &/ implementation of project	Deep retrofit implementation facilitation and project support (excluding capital costs), including tendering, selection, coordination, evaluation, and management of engineering or architectural services, construction trades, and other services
5	Deep Retrofit implementation facilitation	
6	Project Tendering	
7	Commissioning	Commissioning and/or recommissioning and building optimizing assessments/studies onboarding, embedding, training or hiring energy managers or retrofit coordinators for client organizations
8	Recommissioning and building optimization	
9	Energy monitoring and tracking system	Selecting, configuring, operating, or training client organizations for the use of monitoring and tracking systems
10	Integrated design process/design charrettes	Delivering design workshops
11	Benchmarking and Reporting	Implementing or training for the use of energy benchmarking and reporting, and project monitoring and verification (M&V)
12	Project monitoring and verification (M&V)	
13	Hosting conferences and information sessions and training	Stakeholder engagement and communication and awareness programs, including knowledge/information dissemination, hosting conferences and information sessions and training (including development and delivery).
14	Awareness programs	
15	Information dissemination	

16	Application for, or achievement of, standards (incl BOMA Best)	Application for, or achievement of, standards or labeling outcomes such as ISO 50001 energy management standard, BOMA Best, LEED or ENERGY STAR Certification, etc.
17	Energy Managers/ Retrofit coordinators	Onboarding, embedding, training or hiring energy managers or retrofit coordinators for client organizations
18	Technical studies	Technical studies / best practices to support innovative approaches for market transformation

### 1.3 BOMA Deep Retrofit Challenge

In alignment with its commitment to sustainability and reducing the environmental impact of buildings, BOMA Canada has applied for the DRAI funding and its application is termed as BOMA Deep Retrofit Challenge. This ambitious program aims to accelerate the adoption of deep retrofits in commercial buildings across Canada, thereby reducing greenhouse gas emissions and contributing to the nation's climate change mitigation efforts.

BOMA is currently contemplating an approach to provide the above 18 eligible Activities for qualified participants in the following manner:

1. Deep Retrofit Awareness:
  - a. Development of Awareness programs
  - b. Hosting conferences and information sessions and training
  - c. Information dissemination
  
2. Incentive Programs (*Requires specific program eligibility requirements to be developed at the program design stage*):
  - a. Progressive Deep Retrofit Journey:
    - i. Energy or carbon audits/assessments
    - ii. Benchmarking and Reporting
    - iii. Technical studies
    - iv. Energy monitoring and tracking system
    - v. Development of business Case/plans/proposals
    - vi. Project Tendering
    - vii. Project Management activities
    - viii. Deep Retrofit implementation facilitation
    - ix. Development &/ implementation of project
    - x. Project monitoring and verification (M&V)
    - xi. Application for, or achievement of, standards (incl BOMA BEST)
  
  - b. Specialized Services (*Requires specific program eligibility requirements to be developed at the program design stage*):
    - i. Commissioning
    - ii. Recommissioning and building optimization
    - iii. Energy Managers/ Retrofit coordinators
    - iv. Integrated design process/design charrettes

In terms of the delivery of the program, BOMA foresees the following structure:

1. **BOMA Canada**

BOMA Canada will play a central role in the overall management and oversight of the BOMA Deep Retrofit Challenge. As the primary recipient of the DRAI funding, BOMA Canada will be responsible for ensuring that the program meets its objectives, achieves its targeted outcomes, and complies with all relevant regulations and reporting requirements.

Specifically, BOMA Canada will:

- a. Provide strategic direction and guidance to ensure that the program aligns with BOMA's mission, values, and priorities.
- b. Monitor program performance, track key metrics, and ensure that the program is on track to achieve its goals and targets.
- c. Manage the program budget, allocate resources, approve expenditures, and ensure financial compliance and reporting.
- d. Serve as the primary liaison with NRCan, managing the relationship, coordinating reporting and compliance activities, and ensuring that the program meets all funding requirements and obligations.
- e. Lead the development and maintenance of the BOMA Deep Retrofit Challenge website and Program Management System, which will serve as the central hub for program information, resources, and participant engagement (additional details are provided within Section 2.7 of this RFP).

## **2. Program Administration Service Provider**

BOMA Canada will procure the services of a single Program Administration Service Provider to serve as the primary implementation partner for the BOMA Deep Retrofit Challenge. The Program Administration Service Provider will be responsible for the day-to-day management and delivery of the program, working closely with BOMA Canada to ensure that the program meets its objectives and achieves its targeted outcomes. Specifically, the Program Administration Service Provider shall provide:

- a. Program design: Working with BOMA Canada to develop the detailed program guidelines, processes, and tools required to implement the program effectively and efficiently.
- b. Implementation: Managing the day-to-day operations of the program, including participant recruitment and engagement, incentive processing and disbursement, and trade ally management.
- c. Reporting: Collecting, analyzing, and reporting on program data and metrics, and providing regular updates to BOMA Canada on program performance and outcomes.
- d. Financial settlement: Managing the financial transactions associated with the program, including incentive payments to participants and trade allies, and providing regular financial reports to BOMA Canada.

For further clarity, the purpose of this RFP is to procure the services of the Program Administration Service Provider. BOMA Canada will work closely with the selected Program Administration Service Provider to ensure that they have the necessary resources, support, and guidance to deliver the program effectively and efficiently.

## **3. Trade Allies**

Trade Allies are independent vendors who provide the eligible Activities directly to program participants. These Activities are the core services and solutions that participants will receive through the BOMA Deep Retrofit Challenge, such as energy assessments, building retrofits, and commissioning services. Trade Allies will be recruited and managed by the Program Administration Service Provider, who will be responsible for ensuring that they meet the program's eligibility criteria, adhere to its guidelines and standards, and deliver high-quality services to participants. In addition to the services provided by Trade Allies, the Program Administration Service Provider may also directly deliver some select eligible Activities to participants. This will allow the Program Administration Service Provider to fill any gaps in the Trade Ally network, ensure consistent quality and service delivery, and provide additional support and guidance to participants as needed.

## **4. Program Participants**

Program Participants are the commercial building facilities, including owners, managers, and tenants, that are eligible to participate in the BOMA Deep Retrofit Challenge. These participants will receive the services and solutions provided by the Program

Administration Service Provider and Trade Allies, as well as the incentives and support offered through the program. To be eligible for the program, participants must meet the criteria established by DRAI and BOMA Canada, such as owning or managing a commercial building in Canada, committing to undertaking an eligible Activity, and agreeing to the program's terms and conditions. The Program Administration Service Provider will be responsible for engaging, and supporting program participants throughout their retrofit journey, from initial assessment and planning to implementation and verification. This will involve providing education and awareness, technical assistance, and incentives to help participants overcome the barriers to undertaking deep retrofits and achieve their energy and sustainability goals.

## 1.4 Program Administration Service Provider Role

The Program Administration Service Provider will play a crucial role in the design, implementation, and management of the BOMA Deep Retrofit Challenge. Working closely with BOMA Canada, and BOMA Canada's Technology Service Provider, Trade Allies, and program participants, the Program Administration Service Provider will be responsible for:

1. Design and launch of the Program
  - a. Designing and planning the program, including developing guidelines, policies, procedures, and materials
  - b. Implementing and managing the awareness programs, including content creation, event coordination, and outreach
2. Administering the Program
  - a. Implementing and managing the incentive programs, including application processing, approvals, participant support, and payment processing
  - b. Onboarding, managing, and monitoring the performance of Trade Allies
  - c. Collaborating with the Technology Service Provider to ensure seamless integration of program components and data sharing
  - d. Ongoing program evaluation, reporting, financial management and continuous improvement

## 1.5 RFP Purpose and Scope

**The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified organizations for the role of Program Administration Service Provider for the BOMA Deep Retrofit Challenge.** The selected organization will work closely with BOMA Canada to design, implement, and manage the program, ensuring its success in accelerating the adoption of deep retrofits in commercial buildings across Canada.

Proponents are encouraged to review the detailed Scope of Services within Section 2 of this RFP, which outlines the currently defined scope as understood by BOMA Canada. Proponents are also encouraged to review materials provided by NRCan in regard to DRAI - <https://natural-resources.canada.ca/energy-efficiency/buildings/deep-retrofit-accelerator-initiative/deep-retrofit-accelerator-initiative-application-guide/24923>.

However, it is important to note that the final scope of services, which will be critical for the ultimate success of the program, will be subject to further discussion and negotiation between BOMA Canada and the preferred proponent prior to commencing program implementation. This collaborative approach ensures that the Program Administration Service Provider's expertise and insights are incorporated into the final program design, maximizing its impact and effectiveness.

The RFP process will follow a defined timeline, with the goal of selecting a Program Administration Service Provider and commencing program implementation by **11th October, 2024**.



## 1.6 Invitation to Proponents

BOMA Canada invites qualified organizations to submit comprehensive proposals in response to this RFP.

Potential proponents are encouraged to express their intention to respond to this RFP by emailing [rfp@bomacanada.ca](mailto:rfp@bomacanada.ca) by the deadline specified in **Section 6.1**. While this step is not mandatory, it helps ensure that all interested parties receive any updates or clarifications issued during the RFP process.

Proponents are further encouraged to review the RFP carefully, ask clarifying questions if needed, and provide innovative solutions that demonstrate their expertise and understanding of the BOMA Deep Retrofit Challenge's objectives.

Proponents should submit their proposals in accordance with the guidelines and requirements outlined in this RFP. Any questions or requests for clarification should be directed to the email address RFP Contact Person (Section 8). BOMA Canada will endeavor to provide responses to questions as received.

BOMA Canada looks forward to receiving proposals from proponents who share our commitment to sustainability, energy efficiency, and driving meaningful change in the commercial real estate sector.

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## 2. Scope of Services

### 2.1 Program Vision

The BOMA Deep Retrofit Challenge conceptual design currently contemplates the following:

- a. Categorization of the 18 eligible services into three broad areas:
  - i. Awareness & Training
  - ii. Progressive Deep Retrofit
  - iii. Specialized Services
- b. Delivery of most of the Activities by qualified technical service providers called Trade Allies:
  - i. Vendors must meet Eligibility Requirements for the specific Activity to qualify as a Trade Ally
  - ii. Participants can select or recommend vendors who will need to qualify as Trade Allies subject to meeting eligibility requirements
- c. Provision of Awareness and Training by BOMA, the Program Administration Service Provider, or Trade Allies:
  - i. Awareness: BOMA & Program Administration Service Provider
  - ii. Information Dissemination: BOMA & Program Administration Service Provider
  - iii. Hosting conferences and information sessions: Program Administration Service Provider & Trade Allies
  - iv. Training: Trade Allies specialized in GHG/deep retrofit training
- d. Incentive Structure:

BOMA Canada intends to pay for the Eligible Expenditures for Activities through Incentives for the Activity based on a percentage of total Eligible Expenditures for each Activity undertaken but not exceeding a cap. To that end, Program Administration Service Provider will recommend the percentage of total Eligible Expenditures for each Activity s with a cap of maximum value payable. Incentive design will be a service provided by the Program Administration Service Provider under program design

The selected Program Administration Service Provider will work collaboratively with BOMA to finalize the program design.

## 2.2 Program Outcomes

The BOMA Deep Retrofit Challenge aims to achieve the following expected outcomes:

Expected Outcomes	Explanation
Number of building owners receiving guidance pertaining to any part of the deep retrofit process	<u>Target Building Owners:</u> 900 participating buildings <u>Pipeline:</u> 6-10 times the number of participating buildings for prospecting
Number of building owners (along with associated number of buildings, floor space, potential energy and GHG savings) receiving guidance pertaining to the pre-development and/or project planning, design, and management of a deep retrofit project	<u>Target Building Owners:</u> 1. 300 building owners 2. 600 participating buildings 3. 1,500,000 sq m Floor space 4. 180,000 GJs annual energy savings potential, 5. 11,066 tons annual GHG savings <u>Assumptions:</u> 2,550 sq m per building, EUI of 1.2GJ/sqm/yr, 10% potential energy reduction, Canada's emission factors of 0.0421 tonnes/GJ for electricity and 0.0767 tonnes/GJ for natural gas
Number of building owners (along with associated number of buildings, floor space, potential energy and GHG savings) receiving guidance pertaining to the implementation of deep retrofit projects	<u>Target Building Owners:</u> 6. 50 building owners 7. 120 participating buildings 8. 300,000 sq m Floor space 9. 36,000 GJs annual energy savings potential, 10. 2,213 tons annual GHG savings <u>Assumptions:</u> 2,550 sq m per building, EUI of 1.2GJ/sqm/yr, 10% potential energy reduction, Canada's emission factors of 0.0421 tonnes/GJ for electricity and 0.0767 tonnes/GJ for natural gas
Number of regions/municipalities supported by the Project	With the presence of local BOMA Associations in all ten provinces, BOMA Canada aims to provide the proposed services country-wide. However, special attention will be given to provinces that have high density of commercial buildings (BC, AB, ON, QC)  BOMA British Columbia, BOMA Calgary, BOMA Edmonton, BOMA Saskatchewan, BOMA Manitoba, BOMA Toronto, BOMA Ottawa, BOMA Quebec, BOMA New Brunswick/Prince Edward Island, BOMA Nova Scotia, and BOMA Newfoundland/Labrador

## 2.3 Program Budget

The BOMA Deep Retrofit Challenge has allocated the following budget for each of the 18 eligible Activities. Note that the budget allocation is provided as a guidance to the Program Administration Service Provider to assess the amount of incentives that can be paid out to participants and Trade Allies for the program.

### 2.3.1 Incentive Budget

Key Activities	Budget Allocation
Energy or carbon audits/assessments	\$2,650,000.00
Development of business Case/plans/proposals	\$500,000.00
Project Management activities	\$350,000.00
Development &/ implementation of project	\$850,000.00
Commissioning	\$400,000.00
Recommissioning and building optimization	\$1,500,000.00

Energy monitoring and tracking system	\$1,000,000.00
Integrated design process/design charrettes	\$200,000.00
Benchmarking and Reporting	\$1,000,000.00
Hosting conferences and information sessions and training	\$1,400,000.00
Awareness programs	\$150,000.00
Application for, or achievement of, standards (incl BOMA Best)	\$600,000.00
Project Tendering	\$300,000.00
Deep Retrofit implementation facilitation	\$850,000.00
Project monitoring and verification (M&V)	\$800,000.00
Technical studies	\$3,000,000.00
Information dissemination	\$400,000.00
Energy Managers/ Retrofit coordinators	\$950,000.00
<b>Total</b>	<b>\$16,900,000.00</b>

**Note:** The budget allocations provided above are indicative and subject to modifications and updates during quarterly reviews. The first comprehensive budget review is scheduled for October 2024. Proponents should consider these figures as guidelines and be prepared for potential adjustments throughout the program lifecycle.

### 2.3.2 Program Administration Budget

In addition to the Activity-specific budget provided above, the overall program administration budget shall not exceed \$3,000,000.00.

Proponents should consider this budget allocation when developing their proposals and ensure that their proposed costs align with the available funds for the overall program administration. Proponents should note that the payment terms for the Program Administration Service Provider are described in Section 7 of this RFP. Invoices are to be submitted quarterly in accordance with the guidelines proposed in the Contribution Agreement between NRCan and BOMA. Settlement of the Program Administration Service Provider's invoices shall be upon receipt of funding from NRCan for approved invoices and could take up to 45 days upon submission of the invoices. This could entail a period of up to 120-150 days for payment towards Eligible Expenditures. Proponents should factor in the cash flow requirements as a consequence of the payment schedule when preparing their proposals.

Please refer to the Pricing and Cost Structure in Section 4.2.7 within the Proposal Submission Guidelines for more information on the required cost breakdown and narrative. For clarity, funding for services developed by BOMA including staff salaries are not included in the program administration budget.

## 2.4 Eligible Expenditures

Eligible expenditures under the BOMA Deep Retrofit Challenge must be directly related to the implementation of the program and fall into the following categories:

1. Salaries and benefits on the payroll for actual time spent by the employees on the program
2. Professional, scientific, technical, management, data collection, and contracting services
3. Travel expenditures, including meals and accommodation, based on National Joint Council Rates
4. Advertising, recruitment, and training (including trainer fees, costs of training development, promotion, deployment, and evaluation)
5. License fees, data purchases, certification costs, and permits
6. Capital expenditures – informatics hardware and software (note: capital expenses for retrofits are ineligible)

7. Material, supplies, and equipment rental (note: equipment installed as a part of a building retrofit is ineligible)
8. Rental of facilities, audio and visual services, and other related costs (excluding hospitality and prizes) associated with delivering workshops, delivering training, conferences, meetings, and other events
9. GST, PST, or HST, net of any tax rebate to which the Recipient is entitled

The Program Administration Service Provider should ensure that all expenditures related to the BOMA Deep Retrofit Challenge align with these eligible categories and maintain proper documentation for auditing and reporting purposes.

## 2.5 Ineligible Expenditures

The following expenditures are considered ineligible under the BOMA Deep Retrofit Challenge:

1. Capital costs (e.g., equipment or materials purchase, or lease and other deep retrofit implementation costs)
2. Land acquisition; leasing land, buildings, and other facilities; leasing equipment other than equipment directly related to the administration of activities in a proposal; real estate fees and related costs
3. Financing charges, legal fees, and loan interest payments, including those related to easements (e.g., surveys)
4. Provincial sales tax and Goods and Services tax/HST, for which the recipient is eligible for a rebate, and any other costs eligible for rebates
5. Costs incurred before Program Launch

The Program Administration Service Provider should ensure that these ineligible expenditures are not included in any aspect of the BOMA Deep Retrofit Challenge program, including participant incentives, Trade Ally reimbursements, or program administration costs. BOMA Canada and the Program Administration Service Provider will work together to ensure compliance with these guidelines and to maximize the impact of the available program funding.

## 2.6 BOMA Roles and Responsibilities

BOMA will play a critical role in the overall management and delivery of the BOMA Deep Retrofit Challenge, providing strategic guidance, oversight, and support to ensure the program's success. To fulfill this role, BOMA will assemble a dedicated team of 4 to 6 staff members who will be responsible for the following key areas:

### 1. **Program Oversight**

The BOMA team will provide overall direction and governance for the BOMA Deep Retrofit Challenge, ensuring that the program aligns with the organization's mission, values, and strategic objectives. This will involve:

- a. Setting program goals, targets, and performance metrics, and monitoring progress against these benchmarks.
- b. Reviewing and approving program policies, procedures, and guidelines developed by the Program Administration Service Provider to ensure consistency, transparency, and accountability, as further detailed within this RFP.
- c. Overseeing the program budget, including allocating resources, approving expenditures, and ensuring financial compliance and reporting.
- d. Managing relationships with key stakeholders, such as government agencies, industry associations, and funding partners, to secure support, resources, and collaboration opportunities.
- e. Providing guidance and support to the Program Administration Service Provider and other program partners to ensure effective program delivery and continuous improvement.

### 2. **Program Marketing and Limited Outreach**

BOMA will lead the overall marketing and outreach efforts for the BOMA Deep Retrofit Challenge, with a focus on building brand awareness, generating interest and participation, and promoting the program's benefits and successes. This will involve:

- a. Developing and implementing a comprehensive marketing and communications strategy that targets key audiences, such as building owners, property managers, and industry stakeholders.
- b. Creating and distributing marketing materials, such as brochures, fact sheets, and case studies, that showcase the program's value proposition and impact.
- c. Managing the program's website and social media presence, including creating and curating content, engaging with followers, and monitoring analytics and performance.
- d. Conducting limited outreach activities, such as speaking engagements, media interviews, and industry events, to promote the program and build relationships with key influencers and partners.
- e. Collaborating with the Program Administration Service Provider and other program partners to ensure consistent messaging, branding, and stakeholder engagement.

### 3. **Awareness Programs**

BOMA will have primary responsibility for developing and delivering awareness programs that educate and engage building owners, property managers, and other stakeholders about the benefits and opportunities of deep retrofits. This will involve:

- a. Developing and managing the Knowledge Hub, a centralized repository of information, resources, and best practices related to deep retrofits, energy efficiency, and sustainability.
- b. Planning and executing a series of training sessions, workshops, webinars, and other educational events that provide participants with the knowledge, skills, and tools they need to undertake deep retrofit projects.
- c. Creating and distributing educational materials, such as guides, checklists, and templates, that support participants in navigating the deep retrofit process and achieving their energy and sustainability goals.
- d. Engaging with industry experts, trade allies, and other partners to develop and deliver content that is relevant, credible, and impactful.
- e. Monitoring and evaluating the effectiveness of awareness programs, and making continuous improvements based on participant feedback and program metrics.

### 4. **Information Dissemination**

BOMA will lead the effort to disseminate information about the BOMA Deep Retrofit Challenge and its outcomes to a wide range of stakeholders, including building owners, property managers, government agencies, industry associations, and the general public. This will involve:

- a. Developing and executing a comprehensive communications plan that leverages a variety of channels and tactics, such as email newsletters, press releases, social media, and events.
- b. Creating and distributing regular program updates, success stories, and impact reports that highlight the program's achievements, benefits, and lessons learned.
- c. Engaging with media outlets, industry publications, and other influencers to secure coverage and promote the program's message and impact.
- d. Collaborating with the Program Administration Service Provider and other program partners to ensure timely, accurate, and consistent information sharing and reporting.
- e. Monitoring and analyzing the reach and effectiveness of information dissemination efforts, and making adjustments as needed to maximize impact and engagement.

In addition to these core responsibilities, BOMA will also be responsible for building and maintaining the BOMA Deep Retrofit Challenge website and Program Management System. These platforms will serve as the central hubs for program information, resources, and participant engagement, and will be critical to the program's success.

BOMA will own and control these platforms, but will grant access to the Program Administration Service Provider for administration purposes, such as managing participant data, processing incentive applications, and generating reports. BOMA will work closely with the Program

Administration Service Provider to ensure that these platforms are designed, developed, and maintained to the highest standards of functionality, usability, and security.

## 2.7 Technology Vision

BOMA is committed to developing the BOMA Deep Retrofit Challenge Website and a comprehensive Program Management System that will be owned by BOMA and designed to support the efficient and effective delivery of the BOMA Deep Retrofit Challenge. The Program Management system will serve as a central hub for all program-related data, workflows, and interactions between BOMA, the Program Administration Service Provider, Trade Allies, and participants.

Key features and functionalities may include:

1. BOMA Deep Retrofit Challenge Website
  - a. Program information, event listings and guide books
  - b. Participant and Trade Ally registration and profile management
  - c. Application submission and tracking for various program services
2. Program Management System
  - a. Content management system for awareness program information dissemination
  - b. Workflow management for Participant, Trade Ally and application review, approval, and processing
  - c. Event management, registrant and attendee tracking
  - d. Incentive calculation and disbursement tracking
  - e. Data collection, analysis, and reporting on program outcomes and impacts
  - f. Communication and collaboration tools for program stakeholders
  - g. Integration with other relevant systems and databases

The Program Administration Service Provider will play a crucial role in shaping the technology vision by providing input on program design, workflows, and data requirements for the BOMA Deep Retrofit Challenge. The insights and expertise of the Program Administration Service Provider will help in ensuring that the relevant sections of the Program Management System are tailored to the specific needs of the BOMA Deep Retrofit Challenge and its stakeholders.

BOMA will be working closely with a dedicated Technology Service Provider to develop the Program Management System, with the Program Administration Service Provider serving as a key stakeholder and collaborator throughout the software development process. The Program Administration Service Provider will be expected to:

1. Participate in requirements gathering and system design sessions related to the BOMA Deep Retrofit Challenge
2. Provide feedback on system prototypes, user interfaces, and workflows related to the BOMA Deep Retrofit Challenge
3. Assist in testing and validation of system features and functionalities
4. Collaborate with BOMA and the Technology Service Provider to refine and optimize the system based on user feedback and program insights

By actively engaging in the software development process, the Program Administration Service Provider will help ensure that the Program Management System is an effective, user-friendly, and valuable tool for delivering the BOMA Deep Retrofit Challenge.

## 2.8 Program Services

The Program Administration Service Provider will be responsible for the following key areas:

### 2.8.1 Program Design and Planning

1. The Program Administration Service Provider will assist in the development of comprehensive program guidelines, policies, and procedures, which will serve as the

foundation for the effective implementation and management of the BOMA Deep Retrofit Challenge. This includes:

- a. Defining clear and concise Participant terms and conditions, as well as eligibility requirements for Activities, to ensure that the program targets the appropriate audience and achieves its intended objectives.
  - b. Developing realistic Participant and activity uptake estimates to inform program planning, resource allocation, and performance monitoring.
  - c. Establishing a Trade Ally code of conduct that sets forth the expectations and standards for participating vendors, along with an escalation framework to address any issues or concerns that may arise.
  - d. Designing an efficient and user-friendly Trade Ally intake process to facilitate the onboarding of qualified vendors and ensure their readiness to support program participants.
  - e. Providing support to BOMA for the review and development of a comprehensive Marketing plan and education and engagement strategy to promote the program, attract participants, and foster ongoing involvement.
2. The Program Administration Service Provider will develop a suite of program materials, including application forms, templates, guides, and a Participant agreement, to streamline the participation process and ensure consistency in program delivery. These materials will be designed with the end-user in mind, focusing on clarity, simplicity, and accessibility.
  3. To ensure a positive participant experience and maintain program integrity, the Program Administration Service Provider will create a robust escalation framework for Participants and the public. This framework will outline the steps and procedures for addressing concerns, complaints, or disputes in a timely and professional manner.
  4. The Program Administration Service Provider will develop a comprehensive Quality Assurance and Quality Control (QA/QC) process for program activities, application processing, data collection, and invoicing. This process will ensure that all aspects of the program are executed to the highest standards of accuracy, consistency, and compliance with established guidelines and requirements.
  5. To support effective program planning and monitoring, the Program Administration Service Provider will create a pre-launch forecast estimating monthly targets for the program period. This forecast will include service delivery estimates, incentive allocation and disbursement projections, anticipated potential energy savings, and potential GHG emissions reductions. These estimates will be based on a thorough analysis of market potential, industry trends, and best practices in deep retrofit programs.
  6. To ensure consistent and accurate communication with program participants, the Program Administration Service Provider will draft standardized program messaging for common program delivery situations. These messages will be carefully crafted to provide clear, concise, and helpful information to participants, while also reinforcing the program's goals and values.

## 2.8.2 Awareness Programs

- a. BOMA Canada is responsible for the development and delivery of all activities related to the building awareness among participants
- b. The Program Administration Service Provider is responsible for the development delivery of activities related to building awareness among the Tier 2 Services Providers (consultants, technical and scientific services providers, etc. – those whose services are managed by the Program Administration Service Provider)

- c. The Program Administration Service Provider will support BOMA Canada in their effort to identify key topics as well as engage and disseminate content to target recipients.

### 2.8.3 Incentive Program

#### 1. **Incentive Program Design and Implementation:**

The Program Administration Service Provider will be responsible for designing and implementing a comprehensive incentive program that encourages participation in the BOMA Deep Retrofit Challenge and supports the achievement of program goals. This includes:

- a. Designing the incentive program structure, which involves determining appropriate incentive levels for Activities based on factors such as Activity type, size, and scope of work.
- b. Developing a complete set of incentive program guidelines for Activities, application forms, and supporting materials that provide clear instructions and requirements for participants, streamline the application process, and ensure compliance with program rules and regulations.
- c. Implementing the incentive program by processing applications, conducting thorough eligibility reviews to verify that projects meet program requirements, and issuing incentive payments to approved participants in a timely and accurate manner.

#### 2. **Application Management Services:**

The Program Administration Service Provider will handle all aspects of application management, from initial intake and review to final approval and payment processing for Activities. This encompasses the following key areas:

##### a. **Application Intake Review and Pre-Approval**

- i. Collaborating with BOMA to develop user-friendly and comprehensive application forms for program activities, which will be integrated into the BOMA Deep Retrofit Challenge website for easy access and submission by participants.
- ii. Acknowledging receipt of each application promptly to confirm successful submission and provide participants with a timeline for review and decision-making.
- iii. Conducting a thorough review of each application to ensure completeness, verify eligibility based on program criteria, and confirm the availability of sufficient program budget to fund the project.
- iv. Generating information requests (IRs) when additional details or clarification are needed from applicants, using clear and customer-friendly language to guide them through the process and minimize delays.
- v. Providing application pre-approval notifications to successful applicants within a specified number of business days, clearly outlining the terms and conditions of the incentive offer and the next steps for Activity implementation.
- vi. Developing and sending timely reminders to applicants to submit their applications for payment, ensuring that all required documentation is collected and deadlines are met.

##### b. **Post-Activity Submission**

- i. Reviewing all application documentation submitted after Activity completion to verify that it is complete, accurate, and consistent with the pre-approved Activity scope and terms.
- ii. Initiating additional information requests (IRs) where necessary to obtain missing data or clarify discrepancies, working closely with applicants to resolve any issues promptly.



- iii. Approving the payment of incentives for applications that meet all program requirements and providing a formal recommendation for incentive payment to the participant.
- iv. Issuing a notice of Payment Recommendation to inform applicants that their submission has been approved and that payment is being processed.
- v. Verifying the actual Eligible Expenditures incurred for each Activity and calculating the final Participant Incentive amount based on program guidelines and the approved project budget.
- vi. Communicating with the Applicant to gather any missing information, clarify submission details, and resolve invoicing issues to ensure accurate and timely payment processing.
- vii. Approving or rejecting the post-Activity submission through the Program Management System, documenting the reasons for any rejections and providing guidance to applicants on how to resubmit successfully.
- viii. Generating an incentive payment report at a frequency established by BOMA (not later than 2 weeks) for all applications recommended for payment, including key Activity details and incentive amounts.

**c. Incentive Payment and Settlement**

- i. Working in close collaboration with BOMA to set up an efficient and secure incentive payment and settlement process that ensures timely and accurate disbursement of funds to participants.
- ii. Providing a detailed Incentive Payment Report to BOMA that includes a description of all incentives to be paid for Applications recommended for Payment in each batch, along with supporting documentation.
- iii. Upon receipt of approval from BOMA, disbursing payments to Participants and/or Trade Allies through Electronic Funds Transfer, ensuring that all necessary banking information is collected and verified.
- iv. Confirming successful payment through a review of bank records and following up with Participants where required to resolve any issues or discrepancies.
- v. Providing a comprehensive reconciliation statement to BOMA, supported by bank statements, for each settlement period to ensure accurate tracking and reporting of incentive payments.

**d. Quality Assurance**

- i. Developing and implementing robust processes to guarantee the quality and integrity of the work performed by the Program Administration Service Provider, including regular audits and reviews of application management activities.
- ii. Establishing clear criteria for identifying high-risk Applications, such as those above a certain dollar value threshold, and subjecting them to additional scrutiny and verification.
- iii. Ensuring that a minimum of 3% of all submitted applications undergo internal quality assurance by senior staff members who are not involved in the direct review of the sampled Applications, to maintain objectivity and identify potential issues or improvements.
- iv. Selecting a representative sample of applications for quality assurance that includes a mix of different types of Activities, Facilities, Regions across Canada, Activities, and Trade Allies, to ensure comprehensive coverage and monitoring.
- v. Preparing a standardized Internal Quality Assurance summary report template for BOMA's review and approval, which will be used to document findings, recommendations, and corrective actions.
- vi. Collaborating closely with BOMA on their own quality assurance and quality control reviews, providing access to all necessary data and documentation and implementing any required changes or improvements.

**e. Customer Support Services**

- i. Establishing a dedicated customer support service that is available to participants and Trade Allies by email and phone during regular business hours (8 am to 5 pm local time) to answer questions, provide guidance, and resolve issues.
- ii. Ensuring that all customer service staff have access to the Program Management System and are fully trained on its use, so they can efficiently assist participants and Trade Allies with their queries and applications.
- iii. Developing a comprehensive Escalation Procedure for BOMA's review and approval, which outlines a tiered approach to handling customer complaints and disputes, with clearly defined service levels and response times.
- iv. Managing all communications related to incentive payments to Participants and Trade Allies, including payment notifications, remittance advices, while ensuring clarity, accuracy, and timeliness.

## 2.9 Trade Ally Management

**1. Trade Ally Management Process Design**

The Program Administration Service Provider will work in close collaboration with BOMA to design a comprehensive Trade Ally management process that outlines the key steps and requirements for vendor onboarding, registration, performance monitoring, and issue resolution. This process will be designed to support the overall goals of the BOMA Deep Retrofit Challenge and ensure a consistent, transparent, and efficient experience for Trade Allies. The Program Administration Service Provider will document the process in detail, including roles and responsibilities, data requirements, and performance standards, and will provide this documentation to BOMA to inform the development of the Trade Ally portal and related systems.

**2. Vendor Intake and Registration Requirements and Onboarding Data Specifications**

The Program Administration Service Provider will develop a comprehensive set of requirements and specifications for vendor intake, registration, and onboarding data collection. These requirements and specifications will be based on industry best practices, program guidelines, and regulatory standards (where required), and will be designed to ensure that only qualified and reputable vendors are onboarded as Trade Allies. The Program Administration Service Provider will provide this information to BOMA to guide the design and implementation of the online registration form and related processes within the BOMA Deep Retrofit Challenge website. This will include:

- a. Specific data fields to be collected, such as activities delivered, regions served, licensing and qualifications, workplace safety insurance, business registration, and HST/GST numbers
- b. Validation and verification steps to ensure data quality and completeness
- c. Approval criteria for onboarding vendors as Trade Allies
- d. Data formats, error-checking rules, and integration requirements for pushing collected information to the Program Management System and other relevant databases
- e. Access control and security protocols for protecting sensitive vendor data

**3. Trade Ally Code of Conduct Development**

The Program Administration Service Provider will be responsible for drafting a comprehensive and business-friendly code of conduct that outlines the expected standards of behavior, ethics, and professionalism for Trade Allies. This code of conduct will cover areas such as compliance with laws and regulations, commitment to quality and customer service, adherence to safety and environmental best practices, avoidance of conflicts of interest, protection of participant privacy, and cooperation with program administrators. The Program Administration Service Provider will submit the draft code of

conduct to BOMA for review and approval, and to integrate the final version into the Trade Ally onboarding process and portal.

#### 4. **Trade Ally Escalation Management Procedures**

The Program Administration Service Provider will develop detailed procedures for managing escalations and resolving issues that may arise with Trade Allies. These procedures will define the roles and responsibilities of Program Administration Service Provider staff, outline the steps for investigating and documenting reported issues, establish timelines and service level agreements for resolution, and specify the protocols for communicating with affected parties. The Program Administration Service Provider will be responsible for implementing and following these procedures, and will work with BOMA to ensure alignment with program goals and values.

## 2.10 Financial Management and Reporting

### 1. **Monthly Reporting**

The Program Administration Service Provider will be responsible for developing a comprehensive Monthly Report template for BOMA's review and approval. This report will serve as a key tool for monitoring program progress, identifying potential issues, and ensuring transparency and accountability. The Monthly Report will include the following sections:

#### a. **Outreach Activities:**

A summary of all outreach and engagement efforts conducted during the month, including events, communications, and partnerships. This section will provide insights into the effectiveness of the program's marketing and promotion strategies.

#### b. **Progress Towards Program Outcomes:**

An analysis of the program's performance against established goals and metrics, highlighting key achievements, challenges, and trends. This section will help BOMA gauge the overall impact and success of the program.

#### c. **Activity Forecast and Pipeline:**

- i. Applications submitted in the month, categorized by status (in draft, under review, pre-approved, post-Activity submission, payment recommended, incentive payment pending or paid)
- ii. Quality Control report, summarizing the results of quality assurance activities and identifying any issues or areas for improvement
- iii. Dollar amounts of Applications by status, providing a financial overview of the program's pipeline and potential incentive obligations

#### d. **Budget and Expenditure Update:**

A detailed breakdown of program expenditures during the month, including a comparison against the approved budget and a forecast of future spending. This section will help BOMA monitor the financial health of the program and make informed decisions about resource allocation.

#### e. **Customer Support Metrics:**

A summary of customer support activities, including the volume of inquiries received (calls, emails), resolution rates, and performance against established service level agreements (SLAs). This section will provide insights into the effectiveness of the program's customer support function and identify any areas for improvement.

f. **Risk Management:**

An assessment of potential risks to the achievement of program outcomes, along with recommended mitigation strategies. This section will help BOMA anticipate and address any challenges that may impact the success of the program.

The Program Administration Service Provider will submit the Monthly Report to BOMA within the first 10 business days of the following month, allowing for timely review and action.

2. **Quarterly Reporting**

In addition to the Monthly Reports, the Program Administration Service Provider will prepare a Quarterly Report that consolidates key information and provides a higher-level overview of program performance. The Quarterly Report will include:

a. **Compilation of Monthly Reports:**

A summary of the information presented in the Monthly Reports for the quarter, highlighting key trends, achievements, and challenges.

b. **Expense Tracking:**

A detailed breakdown of program expenses by Task, in a format that aligns with NRCan's reporting requirements. The Program Administration Service Provider will work closely with BOMA to develop this format and ensure compliance with all relevant guidelines.

c. **Invoicing:**

Copies of all invoices for Eligible Costs incurred during the quarter, including payments to Participants and Trade Allies. These invoices will be accompanied by supporting documentation to facilitate review and approval by BOMA.

d. **Application Review Metrics:**

A summary of the Program Administration Service Provider's performance in reviewing and processing Applications, including the volume of Applications received, the average time to review, and compliance with established service levels.

The Program Administration Service Provider will submit the Quarterly Report to BOMA within 15 business days of the end of the quarter, allowing sufficient time for review and submission to NRCan.

3. **Compliance with NRCan Reporting Guidelines**

As the ultimate recipient of funding from NRCan, BOMA is required to adhere to specific reporting guidelines and deadlines. The Program Administration Service Provider will play a critical role in ensuring compliance with these requirements, including:

- a. Submitting all required documentation and reports to BOMA within the specified timeframes, typically within 30 days of the end of each Claim Period (quarter).
- b. Providing any additional information or supporting documentation requested by BOMA or NRCan to facilitate the review and approval of funding claims.
- c. Participating in any audits or evaluations conducted by NRCan or its designated representatives, and providing full access to all relevant records and data.

4. **Periodic Reporting Requirements**

In addition to the Monthly and Quarterly Reports, the Program Administration Service Provider will be responsible for submitting the following documentation to BOMA within 10 days of the end of each Claim Period:

a. **Updated Cash Flow Statement and Budget:**

A revised forecast of program cash flows and expenditures for the remainder of the program term, based on actual results to date and any changes in assumptions or projections.

b. **Capital Equipment Breakdown:**

A detailed list of any capital equipment purchased during the period, including the make, model, and unit price. This information will be used to assess the eligibility of these costs and ensure compliance with NRCan's funding guidelines.

c. **Performance Report:**

A comprehensive report on the program's activities and achievements to date, including key outputs and performance indicators. The specific format and content of this report will be developed in collaboration with BOMA, based on NRCan's reporting requirements and the program's unique goals and metrics.

5. **Final Program Report**

Within 30 days of the completion of the program, the Program Administration Service Provider will submit a Final Report to BOMA, using a template provided by BOMA. This report will provide a comprehensive assessment of the program's achievements, challenges, and lessons learned, and will include:

a. **Financial Report:**

A detailed accounting of how program funding was used, including a breakdown of expenditures by category and a reconciliation against the approved budget.

b. **Narrative Report:**

A qualitative assessment of the program's impact and outcomes, highlighting key successes, challenges, and lessons learned. This report will also include an analysis of how the program's activities contributed to the achievement of its stated objectives and the broader goals of the BOMA Deep Retrofit Challenge.

The Final Report will serve as a key document for evaluating the overall success of the program and informing future initiatives in the deep retrofit space.

The Program Administration Service Provider will work closely with BOMA Canada throughout the program design and implementation process to ensure alignment with the BOMA Deep Retrofit Challenge objectives and DRAI funding requirements. The final scope of services will be refined in collaboration with BOMA Canada and the selected Program Administration Service Provider based on their expertise, experience, and insights.

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## 3. Eligibility and Qualification Requirements

To be considered for the role of Program Administration Service Provider for the BOMA Deep Retrofit Challenge, proponents must meet the following eligibility and qualification requirements:

### 3.1 Minimum Qualifications and Experience

1. Proven track record of successfully designing and implementing large-scale, national energy efficiency or sustainability programs
2. Minimum of 5 years of experience in managing multi-stakeholder programs, including working with building owners, managers, and industry partners across Canada
3. Minimum of 5 years of experience in managing and delivering Activities similar to those provided under DRAI
4. Demonstrated knowledge of deep retrofits, energy efficiency technologies, and best practices in the commercial real estate sector
5. Strong project management capabilities, with experience in managing complex programs with multiple work streams and deliverables

6. Excellent communication and stakeholder engagement skills, with the ability to build and maintain positive relationships with program participants, partners, and funders across different regions and provinces

## 3.2 National Presence and Partnerships

1. Established presence in major provinces and regions across Canada, with the ability to deploy field staff to support program implementation, partnerships, and collaboration
2. Demonstrated success in building and managing partnerships with local and regional stakeholders, such as utilities, government agencies, and industry associations
3. Experience in adapting program design and delivery to meet the unique needs and contexts of different provinces and regions while maintaining national consistency and alignment
4. Strong network of contacts and relationships within the commercial real estate industry across Canada

## 3.3 Technical Expertise

1. Deep understanding of energy efficiency technologies, measures, and strategies applicable to commercial buildings
2. Familiarity with energy auditing, benchmarking, and measurement and verification (M&V) protocols and standards, such as:
  - a. ASHRAE Level 1, 2, and 3 Energy Audits
  - b. International Performance Measurement and Verification Protocol (IPMVP)
  - c. ISO 50001 Energy Management Systems
  - d. ENERGY STAR Portfolio Manager
  - e. CAN/CSA-C802-14 Energy Audits
3. Knowledge of building energy codes, standards, and certifications, such as BOMA BEST, LEED, and ENERGY STAR
4. Experience with commissioning and recommissioning standards and protocols, such as:
  - a. ASHRAE Guideline 0-2019: The Commissioning Process
  - b. ASHRAE Guideline 1.1-2007: HVAC&R Technical Requirements for the Commissioning Process
  - c. ASHRAE Guideline 1.2-2019: Technical Requirements for the Commissioning Process for Existing HVAC&R Systems and Assemblies
  - d. CSA Z320-11 (R2019): Building Commissioning
  - e. LEED v4.1 Building Operations and Maintenance (O+M): Commissioning e.
5. Experience in developing and delivering technical training, workshops, and educational content related to energy efficiency and sustainability

## 3.4 Program Design and Implementation

1. Proven ability to design and implement comprehensive energy efficiency or sustainability programs, including incentive structures, application processes, and participant support
2. Experience in developing program guidelines, policies, and procedures that ensure program integrity, transparency, and compliance with funder requirements
3. Demonstrated success in meeting or exceeding program targets and deliverables, including energy savings, GHG emissions reductions, and participant engagement
4. Familiarity with best practices in program design, implementation, and evaluation, as well as continuous improvement methodologies

## 3.5 Trade Ally Management

1. Experience in developing and managing trade ally or vendor networks, including recruitment, onboarding, and performance management

2. Knowledge of quality assurance and quality control (QA/QC) processes and standards for energy efficiency services
3. Ability to foster positive and collaborative relationships with trade allies, while ensuring compliance with program requirements and standards

### 3.6 Data Management and Reporting

1. Experience in managing large datasets and ensuring data integrity, security, and privacy
2. Familiarity with data management best practices and relevant regulations, such as Canada's Privacy Act, PIPEDA and CASL
3. Proven ability to generate accurate, timely, and comprehensive program reports and analytics, including energy savings, financial performance, and participant outcomes
4. Experience in working with data management systems, customer relationship management (CRM) platforms, and reporting tools

### 3.7 Financial Management and Stability

1. Demonstrated financial management capabilities, including budgeting, forecasting, and financial reporting
2. Proven ability to manage large program budgets, ensuring cost-effectiveness and compliance with funder requirements
3. Strong financial stability and the ability to meet program financial obligations, including incentive payments and vendor contracts
4. Capacity to manage cash flow requirements resulting from the payment schedule outlined in the Section 7 of this RFP

### 3.8 Partnerships and Collaboration

1. Experience in collaborating with diverse stakeholders, including government agencies, utilities, industry associations, and technology providers
2. Ability to build and leverage strategic partnerships to enhance program reach, impact, and sustainability
3. Demonstrated success in working with technology service providers to integrate program components and ensure seamless data management and reporting

Proponents must provide evidence of meeting these eligibility and qualification requirements in their proposal, including references, case studies, and team member profiles. BOMA Canada reserves the right to verify the information provided and to request additional information as needed.

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## 4. Proposal Submission Guidelines

To be considered for the BOMA Deep Retrofit Challenge Program Administration Service Provider role, proponents must agree to the Terms and Conditions of the RFP Process as mentioned below, without any exception, and submit a comprehensive proposal that addresses all the requirements of the Proposal Format (Section 4.2) as outlined in this RFP.

### 4.1 Terms and Conditions of the RFP Process

1. **Proposal Format:**  
All proposals are to be submitted in English only. The proposal should not be more than 25 pages long, not including Appendices, and should be organized and formatted as stated in the Proposal Format (Section 4.2) of this RFP.

**2. No Incorporation by Reference:**

The entire content of the proponent's proposal should be submitted in a fixed form, and the content of websites or other external documents referred to in the proponent's proposal but not attached, may not be considered to form part of its proposal. If proponents wish to reference websites or external documents, they should obtain the approval of the RFP Contact Person (Section 8) prior to the Submission Deadline. Proponents are responsible for ensuring that all external content that is referenced is accurate and are to provide notice to BOMA of any changes that may arise after submission. BOMA may, at any time, require a proponent to provide a hard copy of some or all of the external content referenced.

**3. RFP Not Binding:**

This RFP is not intended to create and does not create a formal legally binding bidding process. This RFP does not commit BOMA in any way to select a proponent, to proceed to negotiations for an agreement, or to negotiate or enter into any agreement. BOMA reserves the complete right, at any time and in its discretion, to reject all proposals and to terminate this RFP process. This RFP is not intended to create, and should not be construed as creating, a contract between BOMA and any proponent or other person.

**4. Information in RFP:**

BOMA makes no representation, warranty, or guarantee as to the accuracy of the information contained in this RFP or issued by way of addendum, including the value or volume of work to be acquired. Any quantities shown or data contained in this RFP or provided by way of addendum are estimates only and are for the sole purpose of indicating the general volume of the work.

**5. Non-Exclusivity:**

Any Agreement executed in connection with this RFP will not be an exclusive contract for the provision of the services. BOMA may contract with others for the same or similar Services or may obtain the same or similar Services internally. It is the proponent's responsibility to obtain all the information necessary to prepare a proposal in response to this RFP.

**6. Proponents to Bear Their Own Costs:**

The proponent will bear all costs associated with or incurred in the preparation and presentation of its proposal, including, if applicable, costs incurred for interviews.

**7. Proposal to be Retained:**

BOMA will not return the proposal or any accompanying documentation submitted by a proponent.

**8. Conflict of Interest:**

Proponents must not engage in any activity or communication that would constitute or create a Conflict of Interest. BOMA may disqualify a proponent, in its sole and absolute discretion, for any conduct, situation, or circumstance that constitutes a real or perceived Conflict of Interest as determined by BOMA. BOMA may also disqualify a Proponent for:

- a failure to disclose an actual or potential conflict of interest;
- a failure to comply with any requirement prescribed by BOMA in connection with resolution of a conflict of interest; or
- a situation or circumstance in which the proponent's conflict of interest cannot be resolved.

**9. Financial Capability:**

The preferred proponent(s) must have the financial capability to undertake the services. Prior to entering into an Agreement with a Preferred Proponent, BOMA may require the proponent to provide detailed financial information to demonstrate and confirm its financial capability. BOMA may choose not to enter into an agreement with any



proponent that is unable to demonstrate, to the satisfaction of BOMA acting reasonably, its financial capability to undertake the services.

#### 10. Confidential Information:

All information provided by or obtained from BOMA in any form in connection with this RFP either before or after the issuance of this RFP:

- is the sole property of BOMA and must be treated as confidential;
- is not to be used for any purpose other than replying to this RFP and the performance of any subsequent agreement for the services;
- is not to be disclosed without prior written authorization from BOMA; and
- must be returned by the proponent to BOMA immediately upon the request of BOMA.

## 4.2 Proposal Format

A proposal submission by any proponent to BOMA Canada must cover the following:

### 4.2.1 Cover Letter

1. A brief introduction to the proponent's organization and its interest in the BOMA Deep Retrofit Challenge
2. Confirmation of the proponent's acceptance of the terms and conditions outlined in the RFP
3. A declaration, to the effect that:  
"The proponent has carefully examined the RFP documents, including any addenda, and has a clear and comprehensive knowledge of the services required under the RFP. By submitting the proposal, the proponent acknowledges and confirms its understanding that the RFP is not a binding procurement process and that no contract will be created between BOMA and the proponent as a result of the issuance of the RFP or the submission of a proposal"
4. Signature of an authorized representative of the proponent with authority to bind the proponent

### 4.2.2 Executive Summary

1. A high-level overview of the proponent's understanding of the program scope and objectives
2. Highlights of the proponent's key strengths, differentiators, and value proposition
3. Summary of the proposed approach, methodology, and deliverables

### 4.2.3 Company Profile and Experience

1. Detailed information about the proponent's organization, including history, size, location, and organizational structure
2. Description of the proponent's experience and expertise in designing and implementing large-scale, national energy efficiency or sustainability programs in the commercial building sector
3. Case studies and references showcasing the proponent's successful programs and satisfied clients

### 4.2.4 National Presence and Partnerships

1. Description of the proponent's presence and experience in implementing national programs across different provinces and regions in Canada
2. Overview of the proponent's existing partnerships and relationships with key stakeholders in the commercial real estate sector across Canada
3. Strategies for adapting program design and delivery to meet the unique needs and contexts of different regions while maintaining national consistency

4. Plans for deploying field staff to support program implementation, partnerships, and collaboration at the local and regional levels

#### 4.2.5 Technical Approach and Methodology

1. Detailed description of the proponent's proposed approach to program design, implementation, and management
2. Overview of the proponent's strategies for recruitment, engagement, and support of program participants and Trade Allies
3. Description of the proponent's data management, reporting, and quality assurance processes
4. Proposed program timeline, milestones, and deliverables

#### 4.2.6 Project Team and Resources

1. Organizational chart and profiles of the key team members who will be involved in the program, including their roles, responsibilities, and qualifications
2. Description of the proponent's internal resources and capacity to deliver the program, including staff, facilities, and technology infrastructure
3. Identification of any subcontractors or partners that will be involved in the program and their specific roles and responsibilities

#### 4.2.7 Pricing and Cost Structure

Proponents are required to provide a quote for the overall program administration, considering the allocated budget, in the form of a table as provided below:

<b>Fee</b>	<b>FY 2024/2025</b>	<b>FY 2025/2026</b>	<b>FY 2026/2027</b>	<b>Total Amount</b>	<b>Notes</b>
	Upon execution of Agreement to 31 March 2025	1 April 2025 to 31 March 2026	1 April 2026 to 31 March 2027		
Program Administration Fee					Total budget not to exceed \$3,000,000.00

The overall quote should be followed by additional details justifying the provided quote, including but not limited to:

- Description of the proponent's cost control and financial management processes
- Identification of any potential risks or contingencies that may impact program costs
- A narrative justifying the proposed budget and explaining how the proponent will ensure cost-effectiveness and value for money in the delivery of the BOMA Deep Retrofit Challenge.

#### 4.2.8 Appendices

1. Resumes of key team members
2. Detailed case studies of relevant programs and projects (limited to three case studies)
3. References (maximum 3) and testimonials from clients and partners
4. Any additional supporting materials or documentation considered relevant to support the proposal

#### 4.2.9 Proposal Submission Checklist

Proponents must complete and sign this checklist, including it with their proposal submission. This checklist focuses on critical qualifications, capacities, and acknowledgments required for the BOMA Deep Retrofit Challenge Program Administration Service Provider role.

1. Qualifications and Experience:

We confirm a minimum of 5 years experience in managing multi-stakeholder programs across Canada

We confirm a minimum of 5 years experience in managing and delivering Activities similar to those provided under DRAI

We have demonstrated experience designing and developing similar national energy efficiency or sustainability programs

We are currently delivering similar programs at regional, provincial, or national level in Canada

2. Financial and Operational Capacity:

We confirm our financial stability and capacity to manage the program's cash flow requirements as per the payment terms outlined in Section 7.1

We commit to providing proof of required insurance coverage as will be specified in the final contract

3. Compliance and Acknowledgments:

We declare our intent to comply with all RFP terms and conditions as outlined in Section 7

We confirm our ability to meet the proposed timelines and deadlines as outlined in Section 6

We acknowledge and agree to the confidentiality requirements specified in Section 7.2

We acknowledge and agree to the intellectual property rights as specified in Section 7.3

We acknowledge and agree to the data security and privacy requirements as specified in Section 7.4

We hereby declare any potential conflicts of interest:

\_\_\_\_\_ (if none, write "None")

By signing below, we confirm that all statements in this checklist are true and accurate, and that we have included all necessary supporting documentation in our proposal.

Authorized Signature: \_\_\_\_\_

Name and Title: \_\_\_\_\_

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

### 4.3 Proposal Guidelines

**a. Submission Instructions:**

Proponents must submit their proposals electronically in PDF format to the email address of the RFP Contact Person (Section 8) by **30th September, 2024, 5:00 PM EDT**.

**b. Focus on Program Services:**

Proponents are required to focus their proposals on the Program Administration Service Provider role and Scope of Services outlined in this RFP. BOMA has made a decision to separate Technology Services from Program Services for the BOMA Deep Retrofit Challenge, in alignment with BOMA Canada’s broader technology vision and strategy. By focusing on their core expertise in Program Services, proponents can demonstrate their value proposition more effectively and increase their chances of success in this procurement process. BOMA is committed to selecting the most qualified Program Administration Service Provider to ensure the success of the BOMA Deep Retrofit Challenge.

**c. Questions and Clarifications:**

Proponents may submit questions or requests for clarification regarding the RFP to **the email address of the RFP Contact Person (Section 8)**. BOMA Canada will provide responses to all proponents via email and may provide an anonymized version of the questions and answers on the BOMA Canada website.

**d. Additional Information and Clarifications:**

BOMA Canada reserves the right to request additional information or clarification from proponents during the evaluation process. Proponents may be invited to present their proposals and answer questions from the evaluation committee if so requested as part of the selection process.

### 4.4 Proponent Acknowledgement

By submitting a proposal, proponents acknowledge that they acknowledge the terms and conditions of the RFP process and that BOMA Canada is not obligated to accept the lowest-priced or any proposal and may reject any or all proposals at its sole discretion. Proponents are responsible for all costs associated with preparing and submitting their proposals, and BOMA Canada will not reimburse any expenses incurred by proponents in the proposal process.

## 5. Evaluation Criteria

Proposals submitted in response to this RFP will be evaluated based on the following criteria:

Evaluation Criteria	Scoring Details	Points
Company Profile and Experience	Experience in designing and implementing national energy efficiency programs in commercial buildings, especially within the DRAI framework	20
	Success in achieving program objectives and client satisfaction	
	Strength and relevance of references (at least 3) and case studies	
National Presence and Partnerships	Presence and experience in implementing national programs across Canada	25

	Existing partnerships with key stakeholders in the commercial real estate sector	
	Strategies for adapting program delivery to regional contexts	
	Plans for field staff deployment	
Technical Approach and Methodology	Clarity, feasibility, and effectiveness of program design, implementation, and management	25
	Strategies for participant and Trade Ally engagement	
	Data management, reporting, and quality assurance processes	
	Alignment with program objectives and DRAI requirements	
Project Team and Resources	Qualifications, experience, and expertise of key team members	10
	Organizational structure and resource allocation	
	Internal resources and capacity	
Pricing and Cost Structure	Clarity, detail, and reasonableness of proposed budget and cost structure	20
	Cost control and financial management processes	
	Ability to manage cash flow requirements based on the program's payment schedule	
	Justification and risk mitigation for contingencies or cost risks	
	Adherence to program budget without adding cost of money component	

In addition to the scored criteria, BOMA Canada will also consider the following non-scored factors in its evaluation:

- Completeness, clarity, and professionalism of the submitted proposal
- Proponent's demonstrated understanding of the BOMA Deep Retrofit Challenge objectives and requirements
- Proponent's willingness and ability to collaborate effectively with BOMA Canada, the Technology Service Provider, and other program partners
- Proponent's commitment to and alignment with BOMA Canada's values and mission

BOMA Canada reserves the right to shortlist proponents based on the initial evaluation and invite them to present their proposals and answer questions from the evaluation committee. The final selection will be based on a combination of the proposal scores and the outcomes of the presentation and interview process.

The evaluation process will be conducted fairly and transparently, with all proponents being treated equitably. BOMA Canada may seek clarification or additional information from proponents during the evaluation process and may allow proponents to modify their proposals based on feedback received.

## 6. Timeline and Deadlines

To ensure a smooth and timely implementation of the BOMA Deep Retrofit Challenge, the following timeline and deadlines will be adhered to:

## 6.1 RFP Process

1. RFP Release Date: September 13, 2024
2. Deadline for Expressing Intention to Respond: September 25, 2024, 5:00 PM EDT
3. Deadline for Questions and Clarifications: September 25, 2024, 5:00 PM EDT
4. Proposal Submission Deadline: September 30, 2024, 5:00 PM EDT
5. Proposal Evaluation and Shortlisting: September 30 - October 4, 2024
6. Proponent Presentations and Interviews: October 7-10, 2024
7. Final Selection, Contract Negotiation and Contract Award: October 11 - 21, 2024
8. Contract Award and Signing: October 22, 2024

## 6.2 Program Initiation and Planning

1. Kick-off Meeting: October 23, 2024
2. Detailed Program Design and Planning: End of November, 2024
3. Program Materials Development: End of December, 2024
4. Trade Ally Recruitment and Onboarding: January 2025
5. Requirements Discussions For Technology Platform and Testing: October - January 2024

## 6.3 Program Launch and Implementation

1. Program Soft Launch: January 13, 2025
2. Full Program Launch: January 15, 2025
3. Ongoing Program Implementation and Management: January 15, 2025 - March 31, 2027
4. Quarterly Progress Reviews and Reporting: April 10, 2025; July 10, 2025; October 10, 2025; January 9, 2026; April 10, 2026; July 10, 2026; October 9, 2026; January 11, 2027
5. Annual Program Evaluations and Improvement Planning: February 16, 2026, February 15, 2027
6. Program Wrap-up and Final Reporting: April 1-June 30, 2027

## 6.4 Program Quarters and Invoicing Dates

The program will operate on a quarterly basis, with the following defined quarters and corresponding invoicing dates:

2025:

- Q1 (Partial): January 15 - March 31, 2025 | Invoice due: April 3, 2025
- Q2: April 1 - June 30, 2025 | Invoice due: July 3, 2025
- Q3: July 1 - September 30, 2025 | Invoice due: October 3, 2025
- Q4: October 1 - December 31, 2025 | Invoice due: January 5, 2026

2026:

- Q1: January 1 - March 31, 2026 | Invoice due: April 3, 2026
- Q2: April 1 - June 30, 2026 | Invoice due: July 3, 2026
- Q3: July 1 - September 30, 2026 | Invoice due: October 5, 2026
- Q4: October 1 - December 31, 2026 | Invoice due: January 5, 2027

2027:

- Q1 (Final): January 1 - March 31, 2027 | Invoice due: April 5, 2027

The Program Administration Service Provider shall submit invoices to BOMA Canada within three (3) business days of the closing of each quarter, as specified in the invoicing dates above. These dates align with the payment terms outlined in Section 7 of this RFP.

**Note:** In cases where the invoice or progress report due date falls on a weekend or holiday, the invoice or the progress report shall be due on the next business day.

Proponents must demonstrate their ability to meet these deadlines and deliver the program within the specified timeframes. The proposed program plan and timeline should align with these milestones and provide a high level breakdown of the activities, dependencies, and resources required to achieve them.

BOMA Canada recognizes that the timeline may need to be adjusted based on the program's evolving needs, external factors and upon guidelines received from NRCan. The selected Program Administration Service Provider will be expected to work closely with BOMA Canada to refine and adapt the timeline as necessary throughout the program's lifecycle.

By submitting a proposal, proponents acknowledge their understanding of and commitment to meeting the timeline and deadlines outlined in this RFP, as well as their flexibility to adapt to changes as required by BOMA Canada.

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## 7. Program Administration Service Provider Terms and Conditions

By submitting a proposal, the proponent agrees to adhere to the following Terms and Conditions, without any exception, which shall be used as a basis for development of the final contract between BOMA and the preferred proponent:

### 1. Payment Terms

- The payment terms between BOMA Canada and the Program Administration Service Provider will be governed by the terms and conditions negotiated between NRCan and BOMA Canada in the Contribution Agreement.
- BOMA Canada is required to invoice NRCan quarterly (referred to as the "Claim Period") for Eligible Expenditures incurred by the Program Administration Service Provider.
- The Program Administration Service Provider shall submit invoices to BOMA Canada on a quarterly basis, in line with the Claim Period stipulated in the Contribution Agreement, for Services performed during the previous quarter within three (3) business days of closing of the quarter.
- Invoices shall include a detailed breakdown of the services provided, the time and materials expended, and any quarterly performance reports as required by BOMA Canada and detailed within Section 2.10 of this RFP.
- BOMA Canada shall review and approve invoices within seven (7) Business Days of receipt.
- Payment for approved invoices shall be made by BOMA Canada within thirty (30) calendar days of receiving the corresponding funds from NRCan.
- BOMA Canada may, at its sole discretion, withhold a portion of the payment to the Program Administration Service Provider until all required reports and deliverables have been submitted to the satisfaction of BOMA Canada. The holdback shall not exceed ten percent (10%) of the total contract value.
- The Program Administration Service Provider shall maintain accurate and complete records of all invoices and payments, which shall be available for review by BOMA Canada upon request.
- In the event of any disputed charges, BOMA Canada shall notify the Program Administration Service Provider in writing within three (3) Business Days of receiving the invoice. The Program Administration Service Provider and BOMA Canada shall work together in good faith to resolve any disputed charges in a timely manner.
- The Program Administration Service Provider shall be responsible for all expenses incurred in connection with the performance of the Services, unless otherwise agreed upon in writing by BOMA Canada.

- BOMA Canada reserves the right to withhold payment for Services that do not meet the requirements outlined in this Agreement or that have not been performed to the satisfaction of BOMA Canada.
2. Confidentiality and Non-Disclosure
    - The Program Administration Service Provider shall maintain strict confidentiality of all information, data, and materials related to the BOMA Deep Retrofit Challenge including the details shared within this RFP.
    - The Service Provider shall not disclose any confidential information to third parties without prior written consent from BOMA Canada.
    - The Service Provider shall ensure that all employees and subcontractors are bound by confidentiality agreements.
  3. Intellectual Property Rights
    - All intellectual property rights related to the BOMA Deep Retrofit Challenge, including content, materials, designs and software, shall remain the property of BOMA Canada.
    - The Program Administration Service Provider shall not use or reproduce any intellectual property without prior written consent from BOMA.
  4. Data Security and Privacy
    - The Program Administration Service Provider shall implement and maintain appropriate security measures to protect participant data and ensure compliance with relevant privacy laws and regulations.
    - The Program Administration Service Provider shall host all of the BOMA Deep Retrofit Challenge data within the geographical borders of Canada at all times.
    - The Program Administration Service Provider shall promptly notify BOMA Canada of any data breaches or security incidents related to the BOMA Deep Retrofit Challenge.
  5. Conflict of Interest
    - The Program Administration Service Provider shall disclose any potential conflicts of interest related to the BOMA Deep Retrofit Challenge.
    - The Program Administration Service Provider shall not engage in any activities that may compromise the integrity or impartiality of the program.
  6. Performance Standards and Service Level Agreements
    - The Program Administration Service Provider shall adhere to the performance standards and service level agreements outlined in the final contract.
    - The Program Administration Service Provider shall be subject to regular performance reviews and shall address any identified deficiencies promptly.
  7. Termination and Transition
    - BOMA reserves the right to terminate the contract with the Program Administration Service Provider for cause or convenience, as specified in the final contract.
    - Upon termination, the Program Administration Service Provider shall cooperate fully with BOMA to ensure a smooth transition of services to a new provider or BOMA's internal team.
  8. Indemnification and Liability
    - The Program Administration Service Provider shall indemnify and hold BOMA harmless from any claims, damages, or losses arising from the Service Provider's performance or breach of the final contract.
    - The Program Administration Service Provider shall maintain adequate insurance coverage as specified in the final contract.
  9. Governing Law and Dispute Resolution



- The contract shall be governed by and construed in accordance with the laws of the jurisdiction specified by BOMA.
- Any disputes arising from the contract shall be resolved through mediation or arbitration, as specified in the final contract.

10. Compliance with Laws and Regulations

- The Program Administration Service Provider shall comply with all applicable laws, regulations, and industry standards related to the BOMA Deep Retrofit Challenge.

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## 8. Contact Information

For any questions, clarifications, or additional information regarding this RFP, please contact:

**RFP Contact Person -**

Bala Gnanam  
Vice President - Sustainability, Advocacy and Stakeholder Relations  
Building Owners and Managers Association of Canada Inc.  
1002 - 141 Adelaide Street West,  
Toronto, Ontario M5H 3L5  
Email: [rfp@bomacanada.ca](mailto:rfp@bomacanada.ca)

All communication related to this RFP must be directed to the designated contact person listed above. Proponents are not permitted to contact any other BOMA Canada staff, board members, or stakeholders regarding this RFP without prior written consent.

Proponents may submit their questions or requests for clarification via email to the designated contact person. BOMA Canada will endeavor to respond to all inquiries within three (3) business days of receipt. All questions and responses will be shared with all proponents via email to ensure fairness and transparency.

Proponents are encouraged to submit their questions well in advance of the proposal submission deadline to allow sufficient time for BOMA Canada to provide a response and for proponents to incorporate any clarifications into their proposals.

BOMA Canada reserves the right to modify or amend this RFP at any time before the proposal submission deadline. Any changes or additional information will be communicated to all proponents via email. Proponents are responsible for regularly checking their email for updates and ensuring that they have received all relevant information.

Proponents must not rely on any verbal or informal communication regarding this RFP. Only written information provided by the designated contact person or contained within this RFP and any official amendments should be considered binding.

By submitting a proposal, proponents acknowledge that they have read, understood, and agree to abide by the communication protocols and restrictions outlined in this RFP. Failure to comply with these guidelines may result in disqualification from the selection process.

BOMA Canada looks forward to receiving your questions and proposals and appreciates your interest in the BOMA Deep Retrofit Challenge Program Administration Service Provider role.