



**BOMA Enspire** (formerly Deep Retrofit Challenge)  
**Program Administration Service Provider RFP Questions and Answers**

Last Updated: September 25, 2024

**Important Update:** Please note that the Deep Retrofit Challenge has been officially named 'BOMA Enspire'. All references to the "Deep Retrofit Challenge" in the RFP and related documents should be understood to mean "BOMA Enspire" moving forward.

This document contains questions submitted by potential proponents regarding the Request for Proposal for the Program Administration Service Provider role in the BOMA Enspire (formerly Deep Retrofit Challenge), along with BOMA Canada's responses.

The questions and answers provided below are intended to clarify aspects of the RFP and assist potential proponents in preparing their proposals. This information supplements, but does not supersede, the details provided in the official RFP document.

Please note that the deadline for submitting questions was September 25, 2024, at 5:00 PM EDT. No further questions will be addressed after this deadline.

All potential proponents are encouraged to review this Q&A document thoroughly, as the information provided may be relevant to the preparation of proposals.

No.	Question	Answer
1	Will BOMA Canada consider extending the proposal submission deadline?	After evaluating multiple requests and considering the program requirements, we have decided to extend the proposal submission deadline. The new deadline for submission is <b>Monday, October 7th, 2024</b> , extended from the original date of Monday, September 30th, 2024. This extension aims to provide additional time for proposal preparation while ensuring no delay to the program launch date of January 15th, 2025. Please note that further updates to the RFP process timelines, based on the new proposal submission deadline, will be communicated in the form of an addendum in a separate document.
2	Could you provide additional details on the development of the Program Management	The Program Management System is currently in the initial planning stages. We anticipate that the selected Program Administration Service Provider

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	System? What stage is the system currently in, and at what points will the Program Administration Service Provider have the opportunity to provide input on configurations?	will have multiple opportunities to provide input on configurations throughout the development process. This will likely include participation in requirements gathering sessions, system design discussions, and user acceptance testing. We're committed to ensuring that the system meets the needs of all stakeholders, including the Program Administration Service Provider.
3	Can you share more details about BOMA's role in participant identification and recruitment?	BOMA Canada will take the lead in business development and facilitating enrollment into the program. Once participants are enrolled, it will be the responsibility of the Program Administration Service Provider to guide participants through the various stages of the process, ideally towards the implementation of measures. BOMA Canada will provide support to the Program Administration Service Provider in this process as necessary.
4	Will the IT system have a back end with application workflow that allows for processing?	Yes, the IT system will have a back end with application workflow that allows for processing. While still in design, the system is expected to include: <ol style="list-style-type: none"> <li>1. Applicant &amp; Trade Ally data management,</li> <li>2. Structured workflow engine for application lifecycle,</li> <li>3. Application routing and assignment</li> <li>4. Internal document management</li> <li>5. Role-based access controls</li> <li>6. Change request management</li> <li>7. Automated emails for information requests,</li> <li>8. Internal review workflow for financial incentives</li> <li>9. Batch updates for financial settlements</li> <li>10. Reporting &amp; analytics.</li> </ol> The Program Administration Service Provider will collaborate with BOMA Canada and our technology provider to finalize system requirements between



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		October and December 2024 and keep sharing their inputs over the term of the contract
5	Will BOMA allow limited revisions to the terms and conditions in Section 7?	BOMA is open to limited revisions of the terms and conditions in Section 7, subject to negotiation with the selected proponent.
6	Will BOMA conduct a Best And Final Offer (BAFO) phase to negotiate the final award?	At this time, BOMA does not plan to conduct a Best And Final Offer (BAFO) phase. However, we reserve the right to negotiate with the preferred proponent if needed.
7	Will BOMA pre-fund the Incentives budget as a draw down when expensed?	BOMA will not pre-fund the Incentives budget. The payment structure will align with the terms outlined in the RFP, based on actual expenses incurred.
8	Will any Personally Identifiable Information (PII) be shared by BOMA with the successful awardee?	Personally Identifiable Information (PII) will be shared with the successful awardee as necessary for program administration. This will be subject to strict data protection and privacy protocols.

**Other Considerations:**

To provide updates on the current status of the program and additional clarity on some aspects of the program, we offer the following information:

1. The Enspire program has been officially launched for pre-enrolment at BOMEX 2024, BOMA Canada’s annual national conference, in September 2024. The program page is live at <https://bomacanada.ca/enspire>, along with a pre-enrolment form. This page will be updated periodically with more information as the program design and workflows evolve.
2. Additional notes for the PASP:
  - a. The PASP will be responsible for developing content for all participants and process related material, including but not limited to:
    - i. Comprehensive program guidelines, policies, and procedures
    - ii. Participant terms and conditions
    - iii. Eligibility requirements for Activities
    - iv. Trade Ally code of conduct
    - v. Escalation framework for Participants and the public
    - vi. Quality Assurance and Quality Control (QA/QC) process documentation
    - vii. Pre-launch forecast with monthly targets
    - viii. Standardized program messaging for common program delivery situations



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- ix. Incentive program structure and guidelines
- x. Application forms for program activities
- xi. Information request (IR) templates
- xii. Risk and control document
- xiii. Internal Quality Assurance summary report template
- xiv. Escalation Procedure for customer complaints and disputes
- xv. Trade Ally management process documentation
- xvi. Trade Ally intake and registration requirements
- xvii. Trade Ally onboarding specifications
- xviii. Trade Ally escalation management procedures
- xix. Application review metrics summary
- xx. Project plans and road maps for participants
- xxi. Technical reports for participants with recommendations
- xxii. Tip sheets and technical briefs on various measures and technologies
- xxiii. Best practices guide for building stakeholder alignment
- xxiv. Standardized methods and procedures for capital cost estimating and energy savings determination
- xxv. Incentive Payment Report template
- xxvi. Reconciliation statement template
- xxvii. Performance Report (quarterly)
- xxviii. Final Program Report
- xxix. Financial Report (part of Final Report)
- xxx. Narrative Report (part of Final Report)

Note that this is not an exhaustive list and there could be other content that PASP might be required to develop depending upon the program design and approach. BOMA Canada will be responsible for all Marketing and Outreach materials and will also be overseeing the final graphic layout and design of all documents wherever required.

- b. BOMA will engage legal services where necessary to cater to the program's legal requirements.
- c. The PASP is expected to work within the allocated administration budget, shared within the RFP document, across the program years, adjusting activities based on program uptake and priorities.

For any further clarifications or information about the RFP process, please refer to the official RFP document or contact the BOMA Canada Team at [rfp@bomacanada.ca](mailto:rfp@bomacanada.ca).



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**Disclaimer:**

The information provided in this Q&A document is intended solely for clarification purposes related to the BOMA Enspire Program Administration Service Provider RFP. While every effort has been made to ensure the accuracy and completeness of this information, it does not constitute an amendment to the original RFP document. In the event of any discrepancy between this Q&A document and the official RFP, the terms and conditions set forth in the RFP shall prevail.

BOMA Canada reserves the right to modify, amend, or withdraw this Q&A document at any time. Potential proponents are responsible for ensuring they have the most current version of all RFP-related documents and for considering this information in the preparation of their proposals.

This Q&A document does not commit BOMA Canada to any specific course of action. The submission of a proposal in response to the RFP remains at the sole risk and cost of the proponent.

For the most up-to-date information and official communications regarding the BOMA Enspire Program Administration Service Provider RFP, please refer to the designated RFP contact.