

Request for Proposals

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Energy Advisor Upskilling Project – Phase 1

RFP Release Date: **June 30th, 2025**

Proposal Due Date: **July 21st, 2025 @2PM AT**

Contact:

Ahmad Mezher
Project Manager, Building to Zero Exchange
amezher@buildingtozero.ca

1.0 Introduction

Building to Zero Exchange (BTZx), operating under [Net Zero Atlantic \(NZA\)](#), is a collaborative initiative focused on enabling net-zero buildings and deep energy retrofits in Atlantic Canada. By connecting stakeholders across industry, government, academia, Indigenous communities, and non-profit sectors, BTZx drives action toward constructing net-zero buildings and retrofitting existing ones at scale. With support from partners including provincial energy agencies, BTZx is committed to building capacity and fostering partnerships for a low-carbon future in the built environment.

This Request for Proposal invites qualified consultants to undertake **Phase 1 of the Energy Advisor Upskilling Project**. Phase 1 will establish a foundation for strengthening the **Energy Advisor** workforce by identifying training gaps, exploring best practices, and developing a roadmap for upskilling. The ultimate goal is to ensure a skilled and sustainable cadre of Energy Advisors to support building-sector climate targets and advanced energy codes. BTZx seeks a Proponent with the expertise to research, engage stakeholders, and formulate strategic recommendations that will inform Phase 2 (implementation) of this initiative.

2.0 Context

The building sector is a significant contributor to economic growth and innovation in Atlantic Canada, but it is also a major source of greenhouse gas (GHG) emissions. Achieving climate objectives requires a transition to high-performance and net-zero buildings through both new construction and retrofits of existing stock. In Canada, all new buildings are expected to be net-zero energy ready by 2030 as per national climate frameworks, with tiered energy codes already introduced to guide this transition. **Provincial Mandates:** Nova Scotia's [Environmental Goals and Climate Change Reduction Act \(EGCCRA\)](#) targets a 53% reduction in GHG emissions below 2005 levels by 2030 and net-zero emissions by 2050. These goals are driving policy and code changes, including adoption of the 2020 National Building Code and National Energy Code for Buildings effective April 1, 2025. Meeting these ambitious targets will require not only new technologies and construction practices but also a **qualified workforce** capable of delivering energy-efficient, net-zero ready buildings.

Within this context, **Energy Advisors (EAs)** play a pivotal role. EAs are trained professionals who evaluate the energy performance of homes and smaller (part 9) buildings, using standardized modeling tools to conduct energy audits and recommend improvements. They are essential to programs like EnerGuide home evaluations and the Federal Greener Homes initiative, which incentivize energy retrofits. As building performance standards rise and retrofit programs scale up, the demand for skilled EAs is growing rapidly. However, the current supply of qualified Energy Advisors is insufficient to meet national and regional needs. In fact, there is a recognized shortage of certified EAs, which has prompted federal investment to train and recruit new advisors. Ensuring an expanded and upskilled pool of Energy Advisors will be critical to achieving efficiency targets, reducing emissions from buildings, and helping homeowners and building owners navigate energy improvements.

3.0 Background

The Energy Advisor Profession: In Canada, Energy Advisors are typically registered through Natural Resources Canada (NRCan) after passing required exams (Foundation and Energy Advisor House exams) and affiliating with a licensed service organization. They use energy modeling software (such as HOT2000 for the EnerGuide Rating System) to assess home energy performance and recommend upgrades. With the evolution of building codes and growth of programs targeting net-zero renovations, the role of EAs is expanding to include modeling for net-zero homes, deep retrofits, and potentially working with new tools (e.g., for modeling multi-unit residential buildings or advanced retrofit systems). Other jurisdictions have parallel roles – for example, the United States utilizes **RESNET HERS Raters** for home energy ratings, and some European countries have energy assessor certifications – each with their own training and certification frameworks. Learning from these examples can help Atlantic Canada modernize its approach to training EAs.

Need for Upskilling: The pace of change in construction and retrofit practices means that EAs must continually update their knowledge. Emerging building technologies (heat pumps, solar PV integration, smart controls), new materials, and advanced modeling techniques (such as 3D energy modeling or data analytics for energy management) are becoming part of an Energy Advisor's toolkit. Moreover, as net-zero standards take hold, EAs will need deeper expertise in *airtightness, envelope insulation, HVAC optimization*, and potentially **zero-carbon building design** principles. There is an opportunity to identify gaps in current training and certification – for instance, areas not sufficiently covered in NRCan's existing curriculum or challenges EAs face in the field – and to address those gaps through targeted upskilling programs. These gaps include certain advanced competencies not currently taught in the standard EA curriculum – for example, mid-construction assessments (pre-drywall), air barrier system evaluation, HVAC system performance testing, hygrothermal risk assessments, and limitations with current modeling software such as HOT2000. Addressing these competencies will ensure accurate energy performance predictions and compliance with higher building code standards (NBC2020 Tier 4 and Tier 5).

Workforce Development and Equity: BTZx is committed to advancing diversity, equity, inclusion, and accessibility (DEIA) in the building workforce. This project will adopt an inclusive lens, recognizing that broadening participation in the Energy Advisor profession is both a challenge and an opportunity. As we upskill the current and future EAs, we aim to attract talent from underrepresented groups and ensure equitable access to training and certification opportunities. A more diverse energy advisory workforce will bring varied perspectives and community connections, ultimately strengthening the region's capacity for a just transition to net-zero buildings.

4.0 Objective

The objective of this RFP is to secure the services of a qualified consulting team to execute Phase 1 of the **Energy Advisor Upskilling Project**. Phase 1 will result in a thorough assessment and strategic plan that sets the stage for implementing targeted training and certification enhancements in Phase 2. Phase 1 is limited to analysis and planning; it will not include delivering training programs. The selected Proponent will undertake research and engagement activities (detailed in Section 5.0 Scope of Work) to produce the following outcomes:

- **Current State & Best Practices Identified:** An overview of existing Energy Advisor training programs, certification requirements, and modeling tool usage in jurisdictions beyond our region, highlighting best practices and successful models that could be applied locally.
- **Stakeholder Insights on Gaps:** An understanding of the needs, challenges, and opportunities as identified by key stakeholders (e.g., current EAs, training organizations, industry associations, etc.), regarding the training and certification process for Energy Advisors.
- **Gap Analysis:** A clear identification of gaps between the current state of Energy Advisor qualifications/training in our region and what is required to meet future demand and performance standards. This includes gaps in technical skills, soft skills, certification pathways, and availability of training resources.
- **Recommendations for Phase 2:** A set of actionable recommendations for developing and delivering enhanced upskilling solutions in Phase 2. These recommendations will cover proposed curriculum elements (topics and competencies to be included in training), delivery approaches (modes of training, partnerships with educational institutions or online platforms, mentorship programs, etc.), and potential certification or accreditation pathways (e.g. new specialty designations or integration with existing NRCan certification) to elevate the Energy Advisor profession.
- **Phase 2 Implementation Roadmap:** A high-level implementation plan outlining how to operationalize the Phase 2 recommendations. This roadmap will include estimated timelines (sequencing of development and rollout over time) and identification of partner types critical for execution (such as colleges, industry bodies, government agencies, or certification boards), providing BTZx with a strategic timeline and partnership model for the next phase.

By delivering these outcomes, Phase 1 will lay the groundwork for a successful Phase 2, ultimately enabling an expanded and upskilled Energy Advisor workforce aligned with Atlantic Canada's net-zero building goals and workforce development priorities.

5.0 Scope of Work

The project will be executed through several key tasks. The Proponent is expected to undertake the following **five tasks** as part of the Phase 1 scope of work. Each task is described below:

Task 1: Jurisdictional Scan of Energy Advisor Training & Tools

Conduct a broad jurisdictional review of how Energy Advisors (or equivalent roles) are trained, certified, and supported in other regions. This should include, at minimum, an examination of **other provinces in Canada** (for example, comparing training programs in provinces like Ontario, BC, etc.), as well as **international examples** (such as the U.S. **RESNET HERS Rater** system, and any notable European or other international energy auditor certifications). The Proponent will document:

- **Training Programs:** How Energy Advisor training is delivered elsewhere (e.g. community college programs, online courses, mentorship/apprenticeship models), including content covered and duration.
- **Certification & Standards:** Certification or licensing requirements in other jurisdictions – for instance, any additional or alternative credentials beyond NRCan’s standard exams, maintenance of certification (continuing education requirements), or tiered certification levels (basic vs. advanced EA designations).
- **Modeling Software and Tools:** The energy modeling or audit tools used in these jurisdictions (e.g. HOT2000, RETScreen, PHPP, other proprietary software) and any emerging tools or methodologies that improve audit quality or efficiency.
- **Outcomes & Best Practices:** Notable successes or best practices from each jurisdiction (e.g., higher pass rates from certain training approaches, innovative partnerships leading to more certified EAs, use of simulation tools or field training that improve competency).

The result of Task 1 will be a **Jurisdictional Scan Report** summarizing findings. This research will provide context and options that can inform local strategies. The Proponent should synthesize the information to highlight approaches that might address the gaps identified in our region.

Task 2: Stakeholder Consultations on Training Gaps and Opportunities

Engage with relevant stakeholders to gather insights on the current state of Energy Advisor training and certification, and to identify gaps and opportunities for improvement. The Proponent will design and carry out **at least five (5) consultation sessions**, including a mix of group discussions and one-on-one interviews. These may include focus groups, interviews, or surveys, as appropriate – the format and mix of engagements are to be proposed by the Proponent to ensure broad and representative input. Stakeholders could encompass

practicing Energy Advisors, candidates who recently attempted or completed EA certification, training providers (e.g. institutions or organizations offering EA prep courses), industry associations (such as home builders or energy efficiency contractors), and any regulatory or program bodies involved with energy evaluations.

Through these consultations, Task 2 should uncover:

- **Perceived Skill Gaps:** Areas where current EAs feel under-prepared or where new EAs struggle (e.g. particular technical topics, field procedures, use of software, client communication, etc.). Specific attention should be given to stakeholders' readiness and capability gaps regarding mid-construction assessments (pre-drywall), air infiltration testing, and advanced building assessment techniques.
- **Training Gaps:** Topics or skills that are not adequately covered by existing training options or materials. This could include advanced building science, handling new technologies, practical hands-on experience, etc.
- **Certification/Process Pain Points:** Any barriers in the certification process or career pathway (for example, difficulty accessing exam preparation, lack of mentorship for new EAs, or geographic/service area gaps in availability of service organizations).
- **Opportunities & Suggestions:** Stakeholder ideas for improving training and certification – such as interest in micro-credentials, on-the-job training programs, continuing education modules for existing EAs, or partnerships with colleges, utilities, or government programs to support training.
- **Regional Considerations:** Any local or regional factors to consider (e.g., incorporating Indigenous community perspectives, or alignment with provincial energy efficiency programs).

The Proponent will document the consultation approach and provide a **Summary of Stakeholder Engagement Findings**, capturing key themes, common concerns, and suggested opportunities. Where appropriate, anonymized quotes or specific examples can illustrate the findings. This stakeholder input will feed directly into the gap analysis and recommendations.

Task 3: Gap Analysis of Energy Advisor Skills and Training

Combine the insights from Task 1 (research) and Task 2 (engagement) to perform a comprehensive **Gap Analysis**. In this task, the Proponent will analyze where the region's current Energy Advisor training and certification ecosystem falls short relative to:

- **Best Practices Identified:** comparing local status quo against the best practices and standards observed in other jurisdictions.

- **Workforce Demand:** evaluating whether the quantity of EAs and the skillsets they possess are sufficient for the forecasted demand (considering upcoming building code changes, retrofit programs, and growth in net-zero construction).
- **Skills and Knowledge Areas:** pinpointing specific knowledge or competency areas that are lacking or need enhancement (for example, if other jurisdictions train EAs in advanced HVAC design or multi-unit building modeling and we do not, that's a gap).
- **Certification Pathways:** identifying any structural gaps in the certification process – e.g., if there is no advanced level certification for specialized skills, or if current exams don't cover critical emerging topics.

The Gap Analysis should clearly articulate the **priority gaps** that need to be addressed to prepare a robust EA workforce for the future. It should consider short-term gaps (affecting current program delivery, such as insufficient number of EAs in certain areas) as well as long-term gaps (affecting the ability to meet 2030/2050 targets, such as missing skillsets for net-zero design). The output will be a **Gap Analysis Report** that maps each identified gap to evidence from research or stakeholder input, providing a solid foundation for developing solutions.

Task 4: Develop Recommendations for Phase 2 Upskilling Strategy

Based on the gaps and opportunities identified, the Proponent will formulate a set of **Recommendations** to be implemented in Phase 2 of the project. These recommendations should be concrete, actionable, and aligned with the findings of the research and consultations. At minimum, the recommendations must address:

- **Curriculum Enhancements:** What topics, modules, or competencies should be included in a revised or supplemental Energy Advisor training curriculum? (e.g., adding training on heat pump optimization, blower door testing best practices, renewable energy integration, advanced modeling techniques, customer engagement, etc.). Recommend the essential curriculum elements to close the skill gaps.
- **Delivery Approaches:** How should the upskilling training be delivered for maximum effectiveness and reach? Consider options such as in-person workshops, online courses or webinars, practical field training, mentorship/apprenticeship programs with experienced EAs, or hybrid models. Provide recommendations on delivery methods and the involvement of educational or industry partners (for example, collaboration with community colleges, professional associations, or online training providers). Also consider accessibility of training across the province/region (e.g., remote learning for rural participants).
- **Certification and Qualification Pathways:** Propose any needed changes or additions to the Energy Advisor certification process or career pathway. For instance, this could

include introducing an intermediate or advanced certification for EAs who acquire specialized skills (perhaps in net-zero new construction or deep retrofits), or establishing a formal mentorship/candidacy period as part of certification to improve quality. Recommendations might also involve working with NRCan or other bodies to recognize new modules or credentials or creating a regional accreditation if appropriate.

Each recommendation should be justified by the Phase 1 findings (research or stakeholder evidence) and, where possible, benchmarked against successful initiatives elsewhere. The recommendations will form a **strategic roadmap** for Phase 2 content. The Proponent should prioritize recommendations and indicate any quick wins versus long-term actions.

Task 5: Phase 2 Implementation Roadmap

Develop a practical **Implementation Roadmap** to carry out the recommended Phase 2 upskilling initiatives. This roadmap will translate the recommendations into a sequenced plan of action. Key elements to include:

- **Phasing and Timeline:** Outline the suggested timeline for Phase 2, breaking it into phases or steps (for example, curriculum design development in early Phase 2, pilot training sessions by a certain date, full program rollout by a target date, etc.). Provide an estimated schedule that demonstrates how and when the various components (curriculum development, partnerships, certification changes, etc.) should unfold. This timeline should be realistic, considering the need for consultation, development, and possible certification approvals.
- **Key Partners and Stakeholders:** Identify the types of partners needed at each stage of implementation. For instance, if developing curriculum, who should be involved? (e.g., provincial energy department, training institutions, NRCan, experienced EAs as subject matter experts). If delivering training, what organizations or networks can be delivery agents? (e.g., colleges, online platforms, professional associations). Rather than naming specific organizations (unless obvious), describe the **partner types and their roles** (e.g., *"a post-secondary institution to host and accredit the training program," "an industry association to help with outreach and participant recruitment,"* etc.). This will guide BTZx in engaging the right collaborators in Phase 2.
- **Resources and Supports:** Briefly note any resource requirements or supporting actions needed for implementation (for example, development of training materials, funding for participant subsidies, tools or software licenses for training, etc.), to ensure Phase 2 success.

- **Risk Mitigation:** Identify any major risks or barriers to implementing the upskilling plan (such as regulatory hurdles, or low uptake risks) and suggest mitigation strategies at a high level.

The Implementation Roadmap should be presented in a clear format (e.g., a timeline with narrative explanation and a stakeholder matrix). It will serve as a guide for BTZx to move forward in Phase 2 quickly and efficiently once Phase 1 is complete. This roadmap will be included as a distinct section of the Phase 1 Final Report and should stand on its own as a planning tool.

6.0 Deliverables

The Proponent is expected to produce the following deliverables for Phase 1. All deliverables will be reviewed by BTZx and feedback provided to the Proponent for refinement as needed:

- **Project Work Plan and Kick-off Meeting:** Within one week of contract award, the Proponent shall hold a kick-off meeting with BTZx to review the project approach and timeline. A brief Work Plan document (outlining the methodology, schedule, key milestones, and stakeholder engagement plan) shall be submitted and approved by BTZx to guide Phase 1 activities.
- **Draft of Final Report – Phase 1 Findings:** A comprehensive Draft Report covering all aspects of the Scope of Work (Tasks 1 through 5). The report should include sections for the jurisdictional scan, stakeholder findings, gap analysis, recommendations, and the implementation roadmap. BTZx will review the draft and provide feedback. This draft should be delivered sufficiently in advance of the final deadline to allow for revisions (e.g., a few weeks before final report due date).
- **Final Report – Energy Advisor Upskilling Phase 1:** The Final Report, incorporating BTZx’s feedback on the draft, will serve as the definitive Phase 1 deliverable. It must clearly present the research findings, engagement insights, identified gaps, recommendations for Phase 2, and the implementation roadmap. The Final Report should be professionally formatted and include an executive summary and/or key highlights for broader communication. Both a PDF and an editable source file of the report will be provided.
- **Presentation of Results:** The Proponent will prepare and deliver a presentation of the Phase 1 findings and recommendations to BTZx and potentially a broader stakeholder audience (to be determined by BTZx). This may be conducted via webinar or in-person meeting. The presentation should summarize the key insights and proposed next steps, allowing time for questions and discussion. (The slide deck or presentation materials should be provided to BTZx for future use.)

- **Supplementary Materials:** Any supporting materials or data developed through the project should be handed over to BTZx. For example, this includes raw data or notes from the stakeholder consultations, detailed tables or spreadsheets from the jurisdictional scan, and any templates or frameworks created for the gap analysis or roadmap. These will help BTZx in Phase 2 and in maintaining continuity.

7.0 Timeline

The table below outlines the anticipated timeline for the RFP process and project deliverables. (Dates are subject to change at BTZx's discretion; any changes will be communicated to all proponents.)

Project Timelines	
Item	Date
RFP Release Date	June 30, 2025
Deadline for Questions to BTZx	July 14, 2025, at 2 pm AT
RFP Closing – Proposal Submission Deadline	July 21, 2025, at 2 pm AT
Anticipated Notice of Award (Selection of Proponent)	July 26, 2025
Project Kick-off Meeting	Week of July 28, 2025
Interim Progress Update (mid-project status meeting)	September 6, 2025
Draft Phase 1 Report Due	September 27, 2025
Final Phase 1 Report Due	October 14, 2025

Proponents should note the tight timeline for deliverables and ensure that their team has capacity to meet the deadlines. The schedule for interim updates and draft submission can be adjusted in consultation with BTZx, but the final completion date is a firm requirement. BTZx will make every effort to facilitate timely feedback and access to stakeholders to support the Proponent in keeping the project on track.

8.0 Project Funding

Funding for Phase 1 of the Energy Advisor Upskilling Project is **capped at a maximum of CAD \$100,000** (including HST). This budget is inclusive of all fees, expenses, and applicable travel or consultation costs to complete the scope of work. Proponents' financial proposals should not exceed this amount. BTZx will evaluate cost-effectiveness as one factor in the selection (refer to Section 12.0 Evaluation) but will not necessarily select the lowest-cost proposal. All prices should be quoted in Canadian dollars. Payment terms will be negotiated with the successful Proponent, with the expectation of progress payments tied to key deliverables (e.g., upon delivery of the draft report and final report).

9.0 Respondent Qualifications

BTZx invites proposals from consultants (firms or teams) that can demonstrate the following qualifications and experience. The successful Proponent **must have**:

- **Expertise in Building Energy Efficiency and Training:** Strong knowledge of energy efficiency in buildings, including familiarity with the role of Energy Advisors or energy auditors. Experience in developing or delivering training programs related to building science, energy management, or sustainability is highly desirable.
- **Knowledge of Energy Modeling Tools and Standards:** Experience with residential energy modeling software (e.g., HOT2000 or similar) and a solid understanding of the technical standards for energy evaluations (EnerGuide Rating System or analogous frameworks). Ideally, team members include certified Energy Advisors or professionals who have worked within the NRCan EnerGuide evaluation system or comparable systems internationally.
- **Stakeholder Engagement & Facilitation Skills:** Demonstrated experience in conducting stakeholder consultations, workshops, or interviews, especially in the context of workforce development or training needs assessment. The team should be adept at engaging diverse stakeholders (industry practitioners, educators, officials, etc.), soliciting candid input, and synthesizing feedback into actionable insights.
- **Workforce Development and Curriculum Design:** Experience with workforce gap analysis, skills assessments, or curriculum design for adult learners/professionals. Projects that involved creating training roadmaps, advising on credentialing, or implementing professional development initiatives will be viewed favorably.
- **Project Management and Research Capacity:** Proven ability to manage and deliver complex research projects on time and on budget. This includes strong analytical and writing skills to produce high-quality reports. The team should have capacity in data gathering (both qualitative and quantitative), comparative analysis, and strategic planning.

Local Knowledge: While not mandatory, familiarity with the Atlantic Canada/Nova Scotia energy efficiency landscape (policies, programs like Efficiency Nova Scotia, local training providers, etc.) will be considered an asset. Proponents from outside the region are encouraged to partner with local organizations or experts to ensure regional context is well understood.

10.0 Proposal Requirements

To be considered, proposals should be clear, concise, and include all components outlined below. Proponents are urged to organize their proposals in the following order for ease of review:

- **Understanding of the Project:** A brief executive summary or introduction demonstrating the Proponent's understanding of the project objectives and the importance of upskilling Energy Advisors in this context. Highlight any key issues or insights the team already foresees and intends to address.
- **Approach and Methodology:** A detailed description of how the Proponent will carry out the Scope of Work (Section 5.0). This should include the methods to be used for the jurisdictional scan (e.g., literature review, key informant interviews), approach to stakeholder engagement (proposed consultation format, number of sessions, recruitment strategy for participants), and how the gap analysis and recommendations will be developed. If any particular tools or frameworks will be employed, note them here. Demonstrate how each task will be accomplished effectively.
- **Work Plan and Schedule:** A work plan that translates the methodology into a timeline. Use a table or Gantt chart to show the timing of key tasks, milestones, interim deliverables, and meetings. Confirm the ability to meet the deadlines in Section 7.0. If proposing any adjustments to the timeline, provide rationale. Include the frequency of progress updates you will provide (e.g., bi-weekly meetings or reports) and how you will coordinate with the BTZx project manager.
- **Project Team and Qualifications:** Introduce the team members who will be involved, their roles, and their relevant experience. Provide a brief overview in the proposal (e.g., a paragraph per key individual outlining credentials and past relevant work). Full CVs or résumés can be attached as an appendix. Clearly identify the Project Manager/Lead and the main point of contact. If multiple organizations are partnering, describe the partnership structure and past collaborations if any.
- **Relevant Experience and Past Projects:** Describe up to **three (3)** projects the Proponent has completed that are similar in scope or relevance. For each example, include the client, project purpose, the Proponent's role, and outcomes achieved. Emphasize experience with workforce training strategies, energy efficiency programs, or stakeholder engagement in the building sector. If available, references or contact information for these projects can be provided (references may be contacted at BTZx's discretion).
- **Budget Proposal:** A detailed budget breakdown for the project. The budget should be presented by task or phase, showing the allocation of hours and fees for each team

member, as well as any direct expenses. Provide daily or hourly rates for personnel and the total expected cost. The budget should align with the Work Plan and demonstrate efficient use of resources within the maximum funding (see Section 8.0). A separate line item should be included for any applicable taxes.

- **Value-Added Proposition:** A brief section highlighting any additional value your team brings to the project. This could include proprietary tools, innovative techniques, strong local partnerships, or commitments to engaging underrepresented groups in the process. If your approach includes any special features (for example the ability to leverage a database of training content, etc.), describe them here.
- **Appendices:** The proposal may include appendices for detailed information such as team CVs, detailed methodologies, or other supporting material. Appendices should be referenced in the main proposal as needed. Keep the main proposal content concise and focused – evaluators will review appendices for additional detail as required.

Proposal Format and Submission: Proposals should be provided as a **single PDF document**. A cover letter (signed by an authorized officer of the Proponent’s organization) should be included. The cover letter must state that the information provided is accurate and that the signatory has authority to bind the Proponent. Electronic submission is required (see Section 11.0 for submission details).

Proposals must be submitted via the following upload link:

<https://netzeroatlantic.sharefile.com/r-rb4783349122a40c1b2e280f8729edc58>

The main body of the proposal (excluding cover letter, title page, and appendices) should not exceed 15 pages.

Proponents should ensure that their proposal is well-organized, with clear headings corresponding to the requirements above. Clarity and brevity are valued – avoid unnecessary boilerplate. The proposal should enable the evaluation committee to easily find information relative to the evaluation criteria.

11.0 Questions and Clarifications

Prospective proponents may submit questions or seek clarification on this RFP up until the deadline specified in Section 7.0 (Deadline for Questions). All inquiries must be made in writing via email. Please direct any questions to:

Email: info@buildingtozero.ca (Subject line: "RFP Query – Energy Advisor Upskilling")

Attention: Ahmad Mezher, BTZx Energy Advisor Upskilling Project

BTZx will compile all questions received by the deadline and post a Q&A document at: <https://buildingtozero.ca/news/rfp-energy-advisor-upskilling-phase-1>.

This process ensures that all proponents have access to the same information. The Q&A will not include the identities of those who submitted the questions. Proponents are encouraged to get their questions in early to ensure a response.

After the question deadline, BTZx is not obligated to respond to further inquiries, and no individual responses will be provided. **Note:** Oral responses to questions will not be binding; only written responses posted at the above link will be considered official and authoritative.

12.0 Evaluation

All proposals received by the submission deadline will be evaluated by a committee appointed by BTZx. The evaluation will be based on the criteria below, which reflect the requirements outlined in this RFP. Proposals should strive to address each of these aspects clearly within their content.

The **evaluation criteria** and their relative weights are as follows:

- **Understanding of Project & Proposed Methodology (30%)** – The degree to which the Proponent demonstrates insight into the project’s objectives, challenges, and context, and the quality of the proposed approach. A strong proposal will articulate a clear methodology for each task, showing creativity, comprehensiveness, and feasibility.
- **Proponent Experience and Qualifications (25%)** – The relevant experience of the firm and project team in areas related to this project. This includes demonstrated success in similar projects (workforce development, energy training, etc.), strength of references or past results, and the qualifications of individual team members. Experience in Atlantic Canada or similar markets will be a plus.
- **Work Plan and Management (20%)** – The realism and clarity of the work plan and timeline. Proposals will be assessed on how well-organized and achievable the plan is, how risks or challenges are accounted for, and the Proponent’s project management approach. An efficient schedule that meets project deadlines will score well.
- **Budget (15%)** – Evaluation of the proposed budget in terms of completeness, appropriateness, and value. While staying within the stated funding cap, does the budget align with the work plan and appear sufficient to perform the tasks? The committee will consider cost-effectiveness (e.g., appropriate allocation of junior/senior staff time) and any value-added elements offered. Note that lowest cost will not automatically score highest; rather, a balanced and justified budget will.
- **Innovation and Value-Added (10%)** – Any additional merits that set the proposal apart, such as particularly innovative approaches, tools, or partnerships that would enhance the project outcome. This also includes the Proponent’s commitment to DEIA principles (e.g., engaging diverse stakeholders, team diversity) and local capacity building, as well as the quality of the proposal presentation (clarity, professionalism, absence of errors).

Each proposal will receive a score out of 100 based on the above weighted criteria.

Thank you for your interest in this initiative. We look forward to reviewing your proposal and potentially working together to advance the skills and capabilities of Energy Advisors in

our region. Through this project, we aim to empower the workforce that will help drive Atlantic Canada's buildings toward a net-zero, sustainable future.