

Request for Proposals

Phase 1: Navigator Training Pilot - Jurisdictional Scan

RFP Release: August 15th, 2025

Proposal Due Date: September 12th, at 2:00 p.m. AST

Contact:

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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 and Federal Governments as funders, BTZx is committed to building capacity and fostering partnerships for a low-carbon future in the built environment.

This Request for Proposals (RFP) seeks a qualified consultant or team to **lead engagement and a jurisdictional scan** that will directly inform the design of the **Navigator Training Pilot**. The jurisdictional scan and needs assessment will form the foundation for a modular, scalable training framework that equips building professionals with the knowledge and competencies required to support deep retrofits across the region. The selected consultant will collaborate closely with BTZx staff, project partners, and community stakeholders to ensure that the research is regionally grounded, equity-informed, and action-oriented.

2.0 Background and Objective

Deep retrofits are gaining momentum across Atlantic Canada, driven by the urgency of climate targets and the economic, social, and health opportunities they provide. However, the implementation of retrofits, at scale, is often constrained by workforce capacity. There is growing recognition that building decarbonization depends not only on technical innovation but also on a well-supported ecosystem of professionals who can coordinate retrofit projects and support building owners from start to finish.

The Navigator Training Pilot responds directly to this capacity gap. The Navigator Training Pilot program seeks to define and support the emerging role of "retrofit navigators", individuals who guide building owners through retrofit planning, coordination, financing, and implementation.

This RFP supports the first phase of the Navigator Training Pilot: a jurisdictional scan and regional needs assessment. The objective of this project is to **identify relevant training models, clarify the scope of the retrofit navigator role, and offer recommendations for delivery models**.

The consultant must ensure that research includes meaningful participation and data collection from all four Atlantic provinces. Insights should reflect regional nuances while remaining scalable across the Maritimes.

The jurisdictional scan will be used to ensure that the Navigator Training Pilot reflects real-world needs, avoids duplication, and contributes meaningfully to regional workforce development. By mapping out the institutional landscape, emerging practices, and delivery opportunities, the consultant's work will lay the foundation for an effective and scalable retrofit navigator training framework.

3.0 Scope of Work

The project will be executed through several key tasks. The Proponent is expected to undertake the following **five tasks**. Each task is described below:

Task 1: Stakeholder Engagement

The consultant will conduct a minimum of ten stakeholder interviews across the Atlantic provinces, with representation from Indigenous communities, municipalities, post-secondary institutions, industry associations, and equity-deserving groups. In addition, the consultant is expected to consult directly with individuals currently working in retrofit navigator roles in Nova Scotia and the broader Atlantic region. These consultations will explore perceptions of the navigator role, regional training gaps, and barriers to participation, as well as real-world insight into current navigator practices and evolving needs.

Task 2: Industry Role Identification

A critical component of this research will be determining which existing roles within the building and retrofit ecosystem are best positioned to be upskilled or transitioned into retrofit navigators. The consultant will assess the suitability of potential audiences — such as architects, energy modellers, energy advisors, municipal officials, and consultants — by analyzing current job functions, alignment with retrofit goals, and gaps in support for Part 3 building retrofits.

Task 3: Competency Mapping and Training Priorities

The consultant will identify the key technical and interpersonal skills required for retrofit navigators, especially in the context of large, Part 3 buildings. These may include, but are not limited to:

- Understanding of building science and enclosure systems
- Knowledge of regulatory and permitting processes
- Familiarity with energy modelling and retrofit planning
- Financial literacy and knowledge of incentive and funding programs
- Stakeholder coordination and client relationship management
- Climate risk awareness and low-carbon material strategies
- Communication skills to bridge technical and non-technical audiences

The scan will identify how these competencies are being taught (if at all) in existing programs and recommend priority areas to include in the new curriculum.

Task 4: Jurisdictional Scan of Training and Skill Development

The selected consultant will conduct a scan of Canadian and international training programs that are relevant to the retrofit navigator role. This includes reviewing instructional models targeting professionals such as energy modellers, energy advisors, project managers, building operators, architects, and engineers. The scan should identify transferable frameworks, delivery strategies, and competency structures that inform the development of a scalable navigator training pathway.

Task 5: Training Delivery Recommendations

The consultant will examine various delivery formats such as micro-credentials, continuing education, and embedded post-secondary curriculum. Special consideration should be given to flexible, modular formats that support working professionals. The scan will also consider integration opportunities with institutions like NSCC, Dalhousie, and other Atlantic colleges and training bodies. Recommendations should be given on how best to provide training on retrofit navigation skills and meet the needs of potential training participants.

4.0 Deliverables

The Proponent will be responsible for the following deliverables, each of which must be reviewed and approved by BTZx prior to final submission:

Deliverable 1. Project Workplan and Kick-off meeting:

A brief, structured workplan summarizing the consultant's approach, proposed interviewees, research questions, and key milestones. Due within two weeks of contract award.

Deliverable 2. Draft of Final Report- Findings

A comprehensive Draft of Final Report covering all aspects of the Scope of Work (Tasks 1-6). The Draft Report combines findings from the scan, interviews, and program review. It must include:

- Clear definition(s) of the retrofit navigator role
- Priority target audiences and rationale
- Core competencies and training priorities, especially for Part 3 buildings
- Recommended training delivery models
- Regional considerations and implications for curriculum design

Deliverable 3. Final Report

The Final Report, incorporating BTZx's feedback on the draft, will serve as the definitive Deliverable for this project. It must clearly present the research findings, engagement insights, identified gaps, recommendations for Phase 2. The Final Report should be professionally formatted and include an executive summary and/or key highlights for broader, potential public communication. Both a PDF and an editable source file of the report will be provided.

Deliverable 4. Final Presentation

A slide presentation (20–30 minutes) summarizing methodology, key findings, and actionable recommendations. This will be delivered to the BTZx team.

All deliverables must be submitted in accessible formats (screen reader-friendly, plain language) and editable files must be shared with BTZx upon completion.

5.0 Project Timeline

The consultant will begin work in early October 2025 and must submit all final deliverables no later than December 15, 2025. The timeline outlined below is intended to guide planning and ensure deliverables align with broader project milestones.

Date Range	Activity
August 15, 2025	RFP Release Date
September 5th, 2025, at 2:00 PM (ADT)	RFP Q&A close date
September 12th, 2025, at 2:00 PM (ADT)	Proposal Submission Due Date
September 26–30, 2025	Contract awarded
October 2, 2025	Project workplan and kick off meeting (Deliverable 1)
October 2025	Jurisdictional scan, literature review, and stakeholder outreach underway (Tasks 2-4)
Mid Oct- End Nov, 2025	Stakeholder engagement (Task 1)
December 1, 2025	Draft Final Report submitted to BTZx (Task 5; Deliverable 2)
December 15, 2025	Final Report and Final Presentation; project close-out (Deliverables 3 & 4)

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.

The consultant will meet with the BTZx project manager on a biweekly basis (or as needed).

BTZx will provide timely feedback on draft deliverables to support this schedule and expects the consultant to build in time for revisions. The consultant is also expected to participate in one to two virtual check-in meetings during the engagement to ensure alignment and progress tracking.

These timelines and expectations are designed to facilitate proactive planning, accountability, and alignment with project delivery windows. BTZx remains open to revisiting the sequencing based on consultant input or project-specific conditions.

6.0 Project Funding

Funding for the project is **capped at a maximum of CAD \$32,000 CAD**, inclusive of all applicable taxes, fees, and expenses. This amount is intended to cover the full scope of work over the contract period (September 2025 to December 2025).

BTZx expects to see a clear and transparent breakdown of costs by activity area and/or phase of work. Value for money and feasibility of delivery will be key evaluation criteria, but BTZx will not necessarily select the lowest-cost proposal.

Payment Terms:

This contract will be issued on a milestone-based payment schedule. Payment will be issued upon approval of the key deliverables as defined in the final work plan and negotiated contract. Proponents may propose their milestone structure, aligned with major delivery, subject to negotiation.

7.0 Respondent Qualifications

BTZx is seeking responses from consultants or firms with a demonstrated track record in research, training design, or workforce development, particularly in the climate, energy efficiency, or building sectors. To be scored favourably, the respondent should demonstrate all or most of the following qualifications:

Core Experience and Expertise

- Experience conducting jurisdictional scans, needs assessments, or program design in a policy, educational, or workforce development context
- Familiarity with retrofit practices, high-performance buildings, or building science concepts
- Understanding of labour market issues and training pathways in Nova Scotia and Atlantic Canada
- Demonstrated ability to engage stakeholders across sectors and regions, including Indigenous communities and equity-deserving groups
- Strong writing and communication skills, including plain language reporting and presentation development
- Capacity to manage deliverables on time and on budget within a defined contract period

Equity, Diversity, and Inclusion (EDI) Orientation:

- Commitment to creating accessible, inclusive communications that respect cultural diversity, language differences, and community-informed narratives

- Experience working in collaboration with Indigenous partners or in support of culturally grounded knowledge-sharing is strongly encouraged
- Examples of research work that represents inclusion if EDIA practices

Preferred but Not Required:

- Experience with curriculum or credential design
- Familiarity with Part 3 buildings
- Experience working with public institutions or professional regulatory bodies
- Capacity to conduct interviews and engagement activities in both English and French

Consultants may work independently or in a small team. Collaborations between subject matter experts, analysts, and facilitators are welcome, provided roles and responsibilities are clearly defined in the proposal.

8.0 Proposal Requirements

All proposals must be submitted as a single electronic document in PDF format. Ensure that the proposal or cover letter is signed by an officer or equivalent with authority to bind the Proponent to the statements made in the proposal. All proposals must be clear, concise, and use inclusive language. Proponents are encouraged to keep the main body of their submission under 12 pages (excluding appendices). Additional materials included in appendices should not exceed 10 pages.

All submissions must meet accessibility standards for digital documents and will be reviewed using the evaluation criteria outlined in the following section.

Proponents are urged to organize their proposals in the following order for ease of review:

Cover Letter

A brief letter introducing the consultant or firm, outlining interest in and understanding of the project, and confirming availability to meet the proposed timeline. Include the name and contact information of the lead proponent.

Approach and methodology

A description of how the proponent plans to undertake the scope of work. 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). If any particular tools or frameworks will be employed, note them here.

Demonstrate how each task will be accomplished effectively. Include any anticipated risks and mitigation strategies.

Workplan 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 and cost breakdown

An itemized budget that includes the following:

- Identifies professional fees (hourly or daily rates) by role or team member
- Breaks down estimated time and cost per deliverable
- Any subcontractor or travel expenses (if applicable)
- Separate line item for applicable taxes (e.g., HST)

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.

9.0 Evaluation Criteria

All complete proposals received by the submission deadline will be reviewed and evaluated by a panel convened by BTZx. The evaluation process is based on the standardized Evaluation Template and has been adapted to the specific needs and scope of this RFP.

Weighted Evaluation

Each proposal will be scored out of 100 points, according to the following weighted criteria:

Evaluation Area	Weight	What We're Looking For
Understanding & Approach	25 pts	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.
Workplan	20 pts	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	20 pts	Realistic and cost-effective budget aligned with deliverables.
Relevant Experience	10 pts	Clear examples of previous work relevant to the project scope and target audience.

Team Qualifications	15 pts	Demonstrated expertise, roles clearly defined, and team capacity to deliver.
Innovation and value added	10 pts	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).

Minimum Threshold

To be eligible for contract award, proposals must receive a minimum of 60 out of 100 points and must score at least 50% in each evaluation area.

Interview or Clarification Round

BTZx may invite the top 2–3 shortlisted proponents for a brief virtual interview or follow-up discussion before final selection. This may include clarification of workplan, approach, or budget details.

Confidentiality and Scoring Integrity

All evaluation panel members will declare any conflicts of interest and adhere to standard BTZx procedures for maintaining privacy, ensuring fairness, and exercising due diligence throughout the review process.

Eligibility

Only Canadian consultants or firms (including registered sole proprietors) will be considered for this contract. BTZx prioritizes regional knowledge, sector familiarity, and alignment with public funding guidelines. Proposals must demonstrate the ability to conduct outreach and produce content relevant to audiences across Nova Scotia and Atlantic Canada.

10.0 Questions and Clarifications

The Building to Zero Exchange will accept content-related questions from interested applicants on an ongoing basis until **September 5th, 2025, at 2 p.m. AST**. Please email stseng-rhoades@buildingtozero.ca with any question prior to this date. Additionally, a Q&A page will be

available on the BTZx [website](#). The names and organizations of those submitting questions will remain anonymous - only the question and Building to Zero Exchanges' response will be posted. The Q&A page will only be available if content related questions have been received.

No verbal questions or inquiries will be accepted. BTZx reserves the right to decline to answer questions received after the deadline.

11.0 Submission Instructions & Deadline

All proposals must be submitted electronically in PDF format. Submissions must be complete, clearly structured, and professionally presented. BTZx promotes accessible document design, including screen reader-friendly formatting and the use of plain language wherever possible.

Submission Method:

Submit at Building to zero Exchange [website](#)

Subject line: "BTZx Phase 1: Navigator Scan- [Your Organization Name]"

Submission Deadline:

September 12th, 2025, at 2:00 PM Atlantic Time (ADT)

Formatting and Length Guidelines:

- Maximum 12 pages for the core proposal (Sections 1–8 of this RFP)
- Additional materials (e.g., CVs, samples, references) may be included in appendices and do not count toward the page limit. Additional materials should not exceed 10 pages
- Use a minimum 11-point font with standard margins and headings for clarity

Late or incomplete submissions will not be considered. Proponents are encouraged to submit in advance of the deadline to ensure successful receipt.

12.0 Terms & Conditions

This RFP does not commit BTZx to award a contract or to pay any costs incurred in the preparation of a proposal. BTZx reserves the right to cancel this RFP, reject any or all proposals, or accept any proposal in whole or in part.

Confidentiality

All materials submitted in response to this RFP will be treated as confidential and used solely to evaluate the proposal. BTZx will not share proposals outside the review panel unless authorized to do so by the respondent.

Ownership of Work

All final deliverables, content, and research produced under this contract will become the property of BTZx, with unrestricted rights to adapt, reproduce, and distribute for educational or outreach purposes. Photographic content must be accompanied by documentation of consent for public use.

Withdrawal and Modification

Respondents may withdraw or revise their proposals at any time before the submission deadline by providing written notice to the BTZx project manager.

Contractual Terms

Awarded consultants will be required to enter into a standard service agreement with BTZx that outlines deliverables, timelines, payment terms, and intellectual property provisions. The agreement may be subject to review by BTZx funders for compliance with public funding obligations.

By submitting a proposal, respondents acknowledge and accept the conditions outlined in this RFP.