

Request for Proposals

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Energy Modeller Training Project – Phase 2

RFP Release Date: **September 26, 2025**

Proposal Due Date: **October 17, 2025 (2:00 PM AT)**

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 energy agencies, BTZx is committed to building capacity and fostering partnerships for a low-carbon future in the built environment.

This Request for Proposals invites qualified proponents to undertake Phase 2 of the Energy Modeller Training Project. Phase 2 will build on the completed Phase 1 needs assessment and gap analysis to develop a Nova Scotia-specific training curriculum for energy modellers. The ultimate goal is to ensure a skilled and sustainable cadre of energy modelling professionals capable of supporting advanced energy codes and net-zero building targets in Nova Scotia. BTZx seeks a Proponent with the expertise to design an industry-informed, inclusive curriculum that addresses identified skill gaps and prepares the sector for the successful delivery of training in Phase 3. **Phase 2 is limited to curriculum design and development; it will not involve delivering the training to participants.** The outputs of Phase 2 will directly inform and enable Phase 3 (training delivery) of this initiative.

2.0 Context

The building sector is a significant contributor to Nova Scotia's economic growth and innovation, 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. Across Canada, all new buildings are expected to be net-zero energy ready by 2030 as per national frameworks, with tiered energy codes introduced to guide this transition. In Nova Scotia, the 2020 National Building Code (NBC) and National Energy Code for Buildings (NECB) 2020 were adopted effective April 1, 2025. These codes include tiered performance standards that will incrementally raise energy efficiency requirements over the coming years, targeting net-zero readiness by 2030 in alignment with provincial climate goals. 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.

3.0 Background

The Energy Modelling Profession: Energy Modellers play a pivotal role in the design and compliance of high-performance buildings. Energy Modellers are professionals who simulate and analyze building energy performance, typically using software tools to model heating, cooling, ventilation, and other energy flows in buildings. They provide insights during building design and retrofits, evaluate compliance with building and energy codes, and help optimize projects to achieve energy and emissions targets. In Nova Scotia, as Tier 2 and higher tiered codes come into effect, a performance-based compliance path will often require detailed energy modelling. Energy Modellers work closely with architects, engineers, and building officials to ensure new construction and major retrofits meet or exceed the NECB 2020 standards for Part 3 commercial/institutional buildings and Section 9.36 requirements for Part 9 residential buildings. Unlike Energy Advisors (who focus on EnerGuide ratings for homes), Energy Modellers typically handle larger or more complex building projects (e.g. Part 3 buildings) and may use a variety of sophisticated simulation tools. There is currently no single licensing body for Energy Modellers in Canada; practitioners often come from diverse backgrounds (engineering, architecture, building science, or as upskilled Energy Advisors) and acquire skills through a combination of formal training and on-the-job experience.

Need for Training and Upskilling: The pace of change in building codes and technologies means Energy Modellers must continually update their knowledge and skills. The adoption of tiered codes in Nova Scotia introduces new technical challenges – for instance, modelling to achieve 25% or 50% better energy performance than baseline code will demand deeper expertise in envelope optimization, HVAC efficiency measures, controls optimization, and airtightness. Emerging tools and approaches (such as parametric modelling techniques and advanced simulation software) are poised to transform the field, but many are complex or have poor user interfaces. Phase 1 of this project (Needs Assessment and Gap Analysis) revealed several critical gaps in the current training ecosystem for energy modellers in Nova Scotia. Notably, far fewer training opportunities exist for **practitioners engaged in Part 3 energy modelling** relative to those working in **Part 9/EnerGuide residential practice**. While numerous courses and resources on energy efficiency and modelling are offered across Canada, most are not tailored to Nova Scotia's new codes or are focused on other jurisdictions and building types. There are limited options for hands-on, experiential learning specific to modelling for code compliance in Nova Scotia's context. Phase 1 consultations also highlighted uncertainty in roles and procedures under the new codes – for example, confusion about what documentation energy modellers must submit, and the capacity of local building officials to review performance modelling. This underscores the need for clear, Nova Scotia-specific training on both technical modelling skills and the procedural aspects of demonstrating code compliance. In addition, stakeholders identified that existing training content from other regions could potentially be adapted rather than reinvented, to efficiently

fill Nova Scotia's needs. Leveraging high-quality curriculum material already developed elsewhere (with appropriate adjustments for climate, codes, and local context) is seen as a key opportunity to accelerate training development while avoiding duplication. Phase 2 will build on these insights by curating and customizing content to close priority skill gaps.

Workforce Development and Equity: BTZx is committed to advancing diversity, equity, inclusion, and accessibility (DEIA) in the building workforce. Broadening participation in the energy modelling field is both a challenge and an opportunity. Currently, energy modellers and related professionals do not yet reflect the full diversity of the communities they serve. Through this project, BTZx aims to attract talent from underrepresented groups and ensure equitable access to training opportunities. The curriculum developed in Phase 2 should be inclusive and accessible to individuals from a range of professional backgrounds – including early-career modellers, architects, engineers, Energy Advisors seeking to upgrade skills, and building officials – and welcoming to people from underrepresented communities (e.g. women, Indigenous peoples, African Nova Scotian, and racialized groups) and those working in or with small municipalities. A more diverse and regionally distributed pool of energy modelling professionals will bring varied perspectives and help ensure that all communities in Nova Scotia can benefit from high-performance building practices. The training will be developed with an inclusive lens, using plain language where possible and offering support for participants with different learning styles or levels of prior knowledge. This focus on inclusivity aligns with BTZx's mandate to ensure a just transition to net-zero buildings, where opportunities for green jobs and skills development are available to all.

4.0 Objective

The objective of this RFP is to secure the services of a qualified consulting team to execute **Phase 2: Curriculum Development** of the Energy Modeller Training Project. Phase 2 will result in a comprehensive training curriculum tailored to Nova Scotia's energy modelling needs, laying the groundwork for implementation in Phase 3. The selected Proponent will **design (but not deliver)** a curriculum that addresses the gaps and recommendations identified in Phase 1. Key objectives and expected outcomes of Phase 2 include:

- **Nova Scotia-Specific Curriculum Design:** Develop a complete training curriculum for Energy Modellers that is explicitly aligned with Nova Scotia's building codes, advancement through the tiers, and industry context. The curriculum will cover the knowledge and competencies required for modelling under the NECB 2020 (including Part 10 energy-performance tiers for Part 3 buildings), and—where applicable to houses and small buildings—NBC 2020 Section 9.36 and its tiered energy requirements, as well as best practices for net-zero/net-zero-ready design in the province. For proposal purposes, the curriculum should address BTZx's current priority skill and knowledge areas—e.g., advanced HVAC modelling, envelope optimization, interpretation of new

code requirements, and documentation for compliance. The full Phase 1 materials, including the *Energy Modelling Action Accelerator Report* and the *Energy Modeller Jurisdictional Scan*, will be provided to the selected proponent upon contract execution.

- **Inclusive, Multi-Audience Accessibility:** Create a curriculum that is accessible to learners from diverse professional backgrounds. The program primarily targets new and transitioning practitioners (e.g., Engineer → Modeller, Architect → Modeller, Energy Advisor → Modeller), with optional advanced CPD electives for experienced modellers. Structure the program with differentiated pathways (Foundational / Intermediate / Advanced), a diagnostic pre-assessment with Recognition of Prior Learning (RPL)/exemptions to place learners appropriately, and flexible delivery suited to working professionals. Include measures that support participation by underrepresented groups and small municipalities (e.g., flexible scheduling, mentorship) and apply adult-learning and accessibility best practices.
- **Leveraging and Adapting Existing Content:** Where possible, utilize existing high-quality training materials and curricula (from other provinces, organizations, or educational institutions) as the basis for the Nova Scotia curriculum. The Proponent will identify relevant external courses, content, and resources that can be adapted to Nova Scotia's context (e.g., adjusting for the local climate, code requirements, and terminology). This will avoid duplication of effort and ensure the curriculum is built on proven content, while filling any gaps with new material as needed. All adapted content should be properly licensed or approved for use, and integrated seamlessly into the overall curriculum.
- **Integration of Innovative Tools and Approaches:** Ensure the curriculum is forward-compatible with emerging energy modelling tools and techniques. Phase 1 research referenced **ongoing advances in user-friendly and AI-enabled modelling tools** that may help streamline compliance modelling. While these tools may still be maturing, the curriculum should be designed to **be adaptable**, such that modules or supplementary lessons on these advanced tools can be included when they become available. For example, if a simplified AI-driven modelling software is released during the project, the Proponent may develop an optional module on its use. More broadly, the curriculum should teach core principles in a tool-agnostic way, preparing participants to apply their skills across different software platforms and to quickly learn new tools. It should also introduce participants to the range of software currently used in Nova Scotia (e.g., eQUEST, EnergyPlus, etc.) and discuss the strengths and limitations of each.
- **Dual Delivery Mode (Online and In-Person):** Design all training materials and activities such that they can be delivered in both online and in-person formats. The

curriculum will ultimately be offered through a Learning Management System (LMS) for remote/self-paced learning as well as via classroom or workshop sessions for those who prefer in-person training. Therefore, Phase 2 outputs must be **LMS-compatible** (e.g., slide decks, videos, and quizzes can be uploaded to an LMS) and also suitable for live instruction. This includes creating any interactive elements in a format that can work both live and asynchronously. The Proponent should consider how to maximize participant engagement in an online environment (through discussion forums, assignments, etc.) while also providing guidance for hands-on or face-to-face components (such as group exercises or demonstrations) for in-person offerings. All content should adhere to accessibility best practices for digital learning (e.g., clear visuals, readable fonts, captioned videos).

By delivering these outcomes, Phase 2 will provide BTZx with a ready-to-implement Energy Modeller training program that is customized to Nova Scotia's needs. The Phase 2 deliverables will position BTZx to move seamlessly into Phase 3, in which the curriculum will be rolled out to participants across the province. Ultimately, this will enable an expanded and upskilled pool of energy modelling professionals, supporting Nova Scotia's transition to net-zero buildings and compliance with increasingly stringent energy codes.

5.0 Scope of Work

The Phase 2 project will be executed through several key tasks. The Proponent is expected to undertake the following tasks as part of the Scope of Work. Proponents should use these tasks as a guide in formulating their approach, and may propose modifications or additions based on their expertise (any such changes should be justified in the proposal).

Task 1: Review Phase 1 Findings and Existing Resources – The Proponent will begin by reviewing all relevant Phase 1 documentation, including the Energy Modelling Action Accelerator Report and the Jurisdictional Scan of training programs. The goal is to extract a clear understanding of the identified skill gaps, training needs, and content opportunities. In conjunction, the Proponent should conduct a focused **scan of existing training resources** that could be leveraged for the Nova Scotia curriculum. This includes reviewing energy modelling courses, workshops, and materials available through Canadian national programs, other provinces, industry associations, post-secondary institutions, and online platforms. Examples might include content from organizations such as Natural Resources Canada, CIET (Canadian Institute for Energy Training), Efficiency Nova Scotia, BCIT/ZEB Learning Centre, ASHRAE, or others. The Proponent will compile an inventory of these resources and evaluate their relevance and quality. Particular attention should be given to content addressing the new 2020 NECB requirements, any innovative training approaches for energy modellers, and materials that can be adapted with minimal changes. The deliverable of this task will be a **Resource Review Summary** highlighting which existing materials will be incorporated or

adapted, and where new curriculum content needs to be developed from scratch (due to lack of suitable pre-existing material).

Task 2: Stakeholder Engagement for Curriculum Design – To ensure the curriculum meets industry needs and is inclusive, the Proponent will engage with key stakeholders as advisors during the design process. Phase 1 included broad consultations; Phase 2 will involve more targeted engagement focusing on curriculum content and format. The Proponent should establish a **Curriculum Advisory Group** or similar mechanism to solicit input and feedback. This group may include representatives such as experienced energy modellers, a building official from a small municipality, an architect or engineer who works with energy models, a recent trainee or new professional in the field, and individuals representing underrepresented communities in the industry. **The Proponent will host at least two (2) facilitated engagement sessions** (e.g., an initial workshop/focus group to gather ideas on essential topics, competencies, and delivery preferences, and a later review session to present the draft curriculum outline for feedback), **and conduct 4–6 one-on-one interviews** with priority stakeholder types—including **at least one participant from a small municipality and representation from underrepresented groups**. Through these engagements, **Task 2 should gather insights on:**

- *Curriculum Content Priorities:* What knowledge and skills do local energy modelling practitioners and their employers deem most critical? (For instance, training on NECB compliance documentation, use of specific software features, interpreting modelling results for design decisions, etc.)
- *Learning Barriers:* Any challenges or barriers learners might face that the curriculum should address. This could include gaps in foundational knowledge (e.g., if some trainees lack certain building science basics), scheduling constraints (the need for part-time/flexible learning), or access issues (such as internet connectivity in rural areas for online components).
- *Inclusivity and Accessibility:* Suggestions to make the training welcoming and effective for a diverse participant base. Stakeholders might offer ideas such as mentorship pairings, additional preparatory modules for those new to the field, culturally relevant case studies, or supports for learners whose first language is not English.
- *Delivery Preferences:* Input on the balance of self-paced versus instructor-led learning, ideal module lengths, and hands-on practice opportunities. Also, recommendations on potential instructors or partner organizations for Phase 3 (though selection of trainers is outside Phase 2 scope, it may inform how materials are designed).
- *Advanced Tools & Future Trends:* Perspectives on upcoming changes that the curriculum should anticipate – e.g., if a certain modelling tool is gaining popularity or if there is

interest in training on processes like Building Information Modelling (BIM) integration or post-occupancy evaluation of models.

The Proponent will document the consultation approach and outcomes in a **Stakeholder Input Summary**, capturing key themes and specific suggestions. This input will directly inform the development of the curriculum structure and content in subsequent tasks.

Task 3: Curriculum Framework Development – Using the insights from Task 1 and Task 2, the Proponent will design a detailed **Curriculum Framework** for the energy modeller training program. This framework will serve as the blueprint of the course. It should define, at minimum: the overall curriculum structure (how the program is organized into courses, modules, units, etc.), the sequence in which topics will be presented, learning objectives/outcomes for each module, and the estimated instructional hours or seat time for each component. The framework should explicitly map the curriculum modules to the gaps and needs identified in Phase 1 – ensuring that every major gap is addressed by one or more parts of the training. For example, if Phase 1 identified a lack of training on interpreting NECB performance compliance reports, the framework should include a module covering that competency. Similarly, the framework should integrate content adapted from external sources as identified in Task 1 (noting where an existing course or material will be used, and what modifications are planned). The Proponent will also outline the **delivery modality** for each module (e.g., “Module X can be delivered as a 3-hour in-person workshop or as two 90-minute online sessions with activities”). The framework should incorporate opportunities for practical application, such as assignments, case studies, or interactive simulations, and describe how these will be handled in online vs. in-person settings. Additionally, the framework will account for the inclusion of advanced tool training: it might, for instance, designate certain modules as optional or “to be updated” pending the availability of new software (ensuring core modules are tool-independent but allowing insertion of tool-specific sub-modules later).

Module-Learner Mapping & Prerequisite Chart: The framework shall include a **Module-Learner Mapping Matrix** that aligns each module to target learner segments, explicitly lists prerequisites/equivalencies, and identifies which modules are foundational vs. advanced. Include a concise **Recognition of Prior Learning (RPL)** policy indicating credentials/experience that allow placement into advanced modules.

The Proponent will present the draft Curriculum Framework to BTZx (and the advisory group from Task 2, if appropriate) for review and refinement before proceeding to content development. The **finalized Curriculum Framework** will be a key interim deliverable, guiding the creation of materials in Task 4.

Task 4: Content Development and Adaptation – Upon approval of the framework, the Proponent will develop the full curriculum content for each module. This is expected to be the most substantial portion of Phase 2’s effort. **Content development** includes creating

presentation slides, lesson plans or instructor notes, participant handouts or reading materials, exercises (with solutions or guidance for facilitators), quizzes or knowledge checks, and any multimedia elements (videos, simulations, etc.) as appropriate for the curriculum.

Differentiated Learning & Pathways

To ensure the curriculum is effective for learners with varied backgrounds, the Proponent shall design and package content to support differentiated learning pathways:

- **Learner Segmentation:** Define primary learner segments (e.g., *Energy Advisor* → *Modeller*, *Engineer* → *Modeller*, *Architect* → *Modeller*, *Building Official* → *Reviewer* (*compliance focus*), *Early-career/New Graduate*).
- **Module Tagging & Mapping:** Tag each module with **Level** (Foundational/Intermediate/Advanced), **Target Learner(s)** (one or more segments), **Prerequisites**, and any **Equivalencies** (i.e., when a credential or experience can substitute for a module).
- **Diagnostic Pre-Assessment & Placement:** Develop a short diagnostic (10–15 minutes) and a **placement rubric** to recommend which modules a learner should **take**, **defer**, or **skip**. BTZx may pilot this in Phase 3. Example: a building-science expert may bypass “Building Science Fundamentals,” while an electrical engineer may be recommended to complete it before HVAC/controls modules.
- **Skip/Fast-Track Policy:** Propose clear criteria (e.g., pre-assessment score thresholds and/or recognized credentials) under which learners can skip specific foundational modules, with links to concise refresher micro-content if desired.
- **Pathway Variants:** For each segment, define an ordered pathway (and estimated hours) — e.g., *Engineer* → *Modeller* (*Part 3 emphasis*), *EA* → *Modeller* (*Part 3 transition*), *Architect* → *Modeller* (*design integration*), *Building Official* → *Reviewer* (*compliance focus*) — indicating which modules are **required**, **recommended**, or **optional**.
- **Accessibility & Inclusion:** Ensure all pathway materials use plain language, visual wayfinding (icons/labels), and options for self-paced or instructor-led formats to support diverse learners, including those in small municipalities and underrepresented groups.
- **LMS Enablement:** Package modules and metadata so an LMS can surface recommended paths, show prerequisites, and record **micro-credentials/badges** for module clusters.

Where existing materials are being leveraged, the Proponent will adapt them to the Nova Scotia context – for example, updating code references to reflect Nova Scotia’s tiered energy

code schedule, replacing out-of-region case studies with local or climatically relevant examples, and ensuring terminology aligns with local practice. All content should be written in clear, professional language suitable for adult learners, and technical concepts should be explained with sufficient depth and clarity. The Proponent should incorporate **instructional design best practices** to enhance learning outcomes (e.g., modules should have clear objectives, content should be broken into manageable segments, and a variety of formats – presentations, discussions, hands-on exercises – should be used to cater to different learning styles). Each module’s materials should explicitly reference back to the learning objectives set in the framework to ensure alignment.

Given the dual delivery requirement, the Proponent must prepare materials in formats suitable for online delivery (e.g., slide decks for virtual presentations, or interactive e-learning modules) and for in-person training (e.g., printable facilitator guides, hands-on activity kits). This may involve developing two versions of certain resources if necessary (for instance, an online quiz vs. an in-class group exercise covering the same topic). **LMS compatibility** is crucial: the Proponent should package the digital content in a way that can be easily uploaded to a Learning Management System – for example, as SCORM-compliant modules or in common formats like PDF, PowerPoint, MP4, etc., depending on BTZx’s chosen platform. The Proponent will coordinate with BTZx on any technical guidelines or templates for the LMS.

Throughout content development, the Proponent should keep inclusivity at the forefront: ensure visuals are culturally diverse, avoid overly technical jargon where not necessary (and provide glossaries for technical terms), and include context or examples that speak to various audiences (e.g., include a scenario from a small town as well as one from a big city; include both new construction and retrofit examples; highlight Indigenous or community energy projects if available).

It is expected that the Proponent will work in iterative drafts, module by module or in sets, allowing BTZx (and potentially select expert reviewers) to provide feedback on sample content before everything is finalized. By the end of Task 4, a **Draft Curriculum Package** (all content in draft form) will be compiled for formal review.

Task 5: Review, Testing, and Finalization – In this task, the Proponent will work with BTZx to refine the curriculum content and ensure it is ready for Phase 3 delivery. The Draft Curriculum Package from Task 4 will be reviewed holistically by BTZx and key stakeholders (BTZx may organize a review panel or use the Curriculum Advisory Group for this purpose). The Proponent will collect and incorporate feedback, correcting any errors, clarifying content, and improving the materials as needed to maximize effectiveness. If feasible within scope, BTZx and the Proponent may arrange an **internal table-top walkthrough** of portions of the curriculum (e.g., with BTZx staff/experts) to gather practical feedback on content flow and comprehension. Insights from such a walkthrough should be used to make final adjustments.

During this phase, the Proponent will also ensure that all curriculum components are **quality assured**: verifying technical accuracy (all code references are correct and up-to-date), checking that learning objectives are met, and proofreading for clarity and grammar. Any supporting materials (datasets for modelling exercises, building plans for case studies, etc.) should be finalized and included. The Proponent will produce a **Final Curriculum Package** that includes all finalized training materials, formatted consistently and ready for deployment. Additionally, the Proponent will prepare an **Instructor Guide or Implementation Plan** to accompany the curriculum – this document should provide guidance to whoever will deliver the training in Phase 3. It may outline recommended scheduling (e.g., how to run the program over a certain number of days or weeks), tips for instructors on facilitating modules (highlighting interactive portions or common difficulties learners might have), and any setup requirements (software needed, room setup for in-person sessions, etc.).

Finally, recognizing that Phase 3 (training delivery) and possibly a Phase 4 (if any, like ongoing updates) will follow, the Proponent should ensure that BTZx is provided with all source files and rights to modify the content in the future. A brief **maintenance recommendation** can be included, suggesting how the curriculum might be kept up-to-date as codes evolve or how new tool modules can be integrated when available (e.g., Module “8” is designed to be replaceable so that future tool-specific content can be inserted when new or simplified tools become available).

Throughout the project, the Proponent is expected to manage the work proactively, maintaining regular communication with the BTZx project manager, including via bi-weekly check-in meetings to ensure the project stays on track and any issues are promptly addressed.

6.0 Deliverables

The Proponent is expected to produce the following deliverables for Phase 2. All deliverables will be reviewed by BTZx, with feedback provided for refinement as needed. The proposal should allocate time for at least one revision cycle on the major deliverables.

- **Kick-off Meeting & Work Plan:** Within one (1) week of contract award, the Proponent shall participate in a project kick-off meeting with BTZx to review the project approach, clarify any questions, and confirm expectations. Following the meeting, the Proponent will deliver a concise **Work Plan** document outlining the agreed methodology, timeline with key milestones, stakeholder engagement plan, and any updated resource needs. This Work Plan will serve as a guiding document for Phase 2 activities and be approved by BTZx.
- **Resource Review Summary (Phase 1 Findings & Existing Content):** A brief report or memo summarizing the outcomes of **Task 1**, including the list of existing training resources reviewed, an assessment of their suitability for use, and identification of

content gaps to be filled. This summary should map the Phase 1 identified gaps to potential sources of content (e.g., “Gap X – will adapt content from Y course; Gap Z – no existing content, new material required”). BTZx will use this deliverable to validate the content strategy before full development begins.

- **Stakeholder Input Summary:** Documentation of the **Task 2** engagement activities and findings. This could be in the form of meeting minutes plus a synthesis report. It should detail who was consulted, the format of engagement (workshop, interview, etc.), and the key feedback received as it relates to curriculum development (content suggestions, format preferences, etc.). Any actionable suggestions or consensus points should be highlighted. If the engagement leads to any changes in direction from the initial plans, those should be noted for BTZx’s awareness.
- **Curriculum Framework (Outline) Document:** The completed **Task 3** curriculum framework, providing the comprehensive outline of the training program. This document will likely include a table of modules with titles, learning objectives, durations, and a brief description of each module’s content, along with notes on delivery mode and prerequisites. It should also include an alignment table or diagram showing how the modules cover the Phase 1 gap areas. The framework document will be delivered in draft form for BTZx review, then a finalized version incorporating feedback. This deliverable represents a checkpoint for overall curriculum design before content creation.
- **Module–Learner Mapping Matrix (Spreadsheet):** A matrix (e.g., Excel/CSV) that tags every module with level, prerequisites, target learner segments, equivalencies, and estimated time.
- **Training Pathways Guide (Branded, Public-Facing Designed Document):** A branded, publicly shareable, professionally designed guide that shows learning paths based on background (e.g., *Engineer* → *Modeller*, *EA* → *Modeller*, *Architect* → *Modeller*, *Building Official* → *Reviewer* (*compliance focus*)). Include flow diagrams and plain-language explanations; show sequences of learning items (required/ recommended/optional), estimated hours and delivery formats (online vs in-person). Indicate whether each item is a BTZx offering or a recognized external option (e.g., ASHRAE/CIET/college micro-credential) and list any prerequisites or equivalencies.
- **Diagnostic Pre-Assessment & Placement Rubric:** A draft 10–15 minute question bank, scoring key, and placement rubric to be piloted during Phase 3 delivery.
- **Prerequisites & Equivalencies Table:** A concise policy table defining prerequisites and recognized equivalencies (e.g., credentials, prior coursework) that permit learners to bypass specified foundational modules.
- **Draft Curriculum Package:** The full set of draft training materials developed in **Task 4**, compiled for review. This includes all participant materials (presentations, handouts, exercises, etc.) and instructor materials (lesson plans, notes) for each module, in whatever format is appropriate (e.g., MS PowerPoint slides, PDF handouts, Word document guides, etc., as well as any multimedia files). The draft should be as complete as possible, though it is understood that some polishing may remain. BTZx will review

this package in detail. Delivery of this draft should be timed to allow for a feedback period and subsequent revisions. The Proponent may choose to submit drafts in batches (e.g., a few modules at a time) for rolling review, but at minimum a consolidated draft package is a required deliverable.

- **Final Curriculum Package (Nova Scotia Energy Modeller Training Curriculum):** The definitive set of Phase 2 curriculum materials, fully developed and revised per feedback. This will include all components ready for use in Phase 3: finalized slide decks, instructor guides, participant handouts, exercise files, assessment tools (quizzes, evaluation forms), and any other training aids. All files should be provided in both the format for delivery (e.g., PDF or PPT for slides, etc.) and editable source formats (so BTZx can make future updates). The Final Curriculum Package should be clearly organized (e.g., by module) and accompanied by a **Module Catalogue** or index that lists each item and its purpose.
- **Instructor/Implementation Guide:** Alongside the final curriculum, an **Instructor Guide** (or implementation manual) should be delivered including **placement & exemptions guidance**. This document will help future instructors or training providers to understand how to deliver the curriculum. It should outline recommended delivery timelines (e.g., agenda for a 2-day in-person workshop series or a multi-week online course schedule), tips for preparation (such as software installation for participants), guidance on facilitating discussions or exercises, and notes on how to evaluate participant progress. If BTZx intends to issue certificates or any accreditation for participants, the guide can also suggest criteria for completion. This guide ensures that the curriculum can be handed off and delivered consistently by different facilitators.
- **Presentation of Results:** The Proponent will prepare and deliver a presentation to BTZx (and potentially a broader stakeholder audience, at BTZx's direction) summarizing the outcomes of Phase 2. This presentation will occur near or at the end of the project. It should provide an overview of the developed curriculum – including the structure, key content areas, and how it addresses the identified gaps – and outline recommendations or considerations for Phase 3 implementation. The session will allow BTZx and other invitees to ask questions and discuss next steps. The Proponent should deliver the presentation (via webinar or in-person as decided) and submit the slide deck or presentation material to BTZx for future reference.
- **Project Documentation & Handover:** The Proponent must hand over all supporting documents and files produced during Phase 2. This includes raw data or notes from stakeholder consultations (for BTZx's records), the inventory of external resources and any licensing information associated, draft iterations if needed, and any other pertinent project files. Additionally, if any particular software or platform was used to develop interactive content (for example, e-learning authoring tools), those source files or an export compatible with BTZx's systems should be provided. The Proponent will ensure BTZx has full rights to use and modify the curriculum content going forward. A final project report or cover memo can be included to list all deliverables and affirm completion of scope.

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	Friday, September 26, 2025
Deadline for Questions to BTZx	Tuesday, October 7, 2025 (2:00 PM AT)
BTZx Posts Q&A / Addendum	Thursday, October 9, 2025
RFP Closing – Proposal Submission Deadline	Friday, October 17, 2025 (2:00 PM AT)
Selection of Proponent	Week of November 10, 2025
Project Kick-off Meeting	Week of November 17, 2025
Resource Review Summary (Task 1)	Tuesday, December 9, 2025
Stakeholder Input Summary (Task 2 complete)	Tuesday, January 13, 2026
Curriculum Framework – Draft (Task 3)	Tuesday, January 27, 2026
Curriculum Framework – Final	Tuesday, February 10, 2026

Draft Curriculum Package (Task 4 – draft)	Tuesday, March 3, 2026
Internal Review & Table-Top Walkthrough	March 4 – March 10, 2026
Final Curriculum Package + Instructor Guide	Tuesday, March 24, 2026
Presentation of Results + Project Handover	Tuesday, March 31, 2026

The schedule for 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 to support the Proponent in keeping the project on track.

8.0 Project Funding

Funding for Phase 2 of the Energy Modeller Training Project is **capped at a maximum of CAD \$200,000 (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.

9.0 Respondent Qualifications

BTZx invites proposals from consultants (firms or teams) that can demonstrate the following qualifications and experience. The successful Proponent (firm) and its key team members should have:

- **Expertise in Building Energy Modelling and Energy Codes:** Strong knowledge of building energy performance modelling, including familiarity with the tools, techniques, and standards commonly used in Canada. This includes experience with energy modelling software (for example EnergyPlus, eQUEST, or other relevant tools) and a solid understanding of building science principles. The team should be well-versed in the National Energy Code for Buildings (NECB) and related standards for energy code compliance. Direct experience in modelling for code compliance or high-performance building design in Nova Scotia or similar jurisdictions will be considered a major asset.
- **Curriculum Design and Adult Education Experience:** Demonstrated experience in developing educational curricula or training programs, ideally for adult professionals in the energy, engineering, or building sectors. This includes the ability to apply instructional design best practices, develop clear learning outcomes, and create engaging training materials. Experience with online learning (e-learning course development, LMS integration) and in-person workshop design are both important. The team should include at least one member with strong pedagogical or curriculum development credentials (e.g., an educational specialist or someone who has designed professional training courses).
- **Inclusive Training Development:** A proven commitment to and experience in developing training that is inclusive and accessible. This could be shown by past projects that involved training in diverse communities, incorporation of DEIA principles in program design, or strategies to support learners of varying backgrounds. For example, experience working with underrepresented groups in trades/technical training, or implementing Universal Design for Learning (UDL) principles, would be relevant. The team should be capable of tailoring content to audiences with different levels of prior knowledge and ensuring that materials are user-friendly for all participants.
- **Stakeholder Engagement & Facilitation Skills:** Strong skills in engaging stakeholders and subject matter experts to inform project outcomes. The Proponent should have experience planning and facilitating consultations such as workshops, focus groups, or interviews – particularly in a context related to training needs assessment or curriculum development. The ability to synthesize input from industry professionals, government officials, and community representatives into actionable design guidance is important.

Past projects that required consensus-building or collaborative design with stakeholders should be highlighted.

- **Project Management and Delivery Capacity:** A track record of successfully managing and delivering complex projects on time and on budget. The Proponent should demonstrate that they have the organizational capacity and project management skills to handle a multi-faceted project with fixed deadlines. This includes having adequate team resources, an appropriate project management approach (for example, use of project plans, timeline management tools, quality control processes), and risk management strategies. Strong communication and reporting skills are also expected, as the project will involve regular updates and coordination with BTZx.
- **Local Knowledge (Desirable):** Familiarity with the Atlantic Canadian and Nova Scotian context in terms of energy efficiency, building industry, and training landscape is considered an asset. This could include knowledge of local initiatives (such as Efficiency Nova Scotia programs), regional climate considerations for building design, or prior collaboration with local institutions (colleges, industry associations, etc.). Proponents from outside the region are encouraged to partner with local organizations or experts to ensure the curriculum reflects Nova Scotia's context. Any such partnership or local expertise should be clearly indicated in the proposal.

In summary, the ideal Proponent will be a multidisciplinary team capable of blending deep technical knowledge of energy modelling with creative and inclusive curriculum development skills. Proposals should clearly articulate the team's qualifications in each of the areas above, highlighting relevant project examples and the roles of key team members in those projects.

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:** Provide a brief executive summary or introduction demonstrating the Proponent's understanding of the project objectives and the importance of upskilling energy modellers in this context. Highlight any key issues, challenges, or insights the team foresees and intends to address. This section should convince evaluators that the Proponent grasps the goals of Phase 2 and the bigger picture of Nova Scotia's push toward net-zero building performance.
- **Approach and Methodology:** Describe in detail how the Proponent will carry out the Scope of Work (Section 4.0). This should include the proposed methods for each task. For example, outline how you will conduct the review of Phase 1 findings and external resources (Task 1) – will you use a framework to evaluate content relevance? – and how you will approach stakeholder engagement (Task 2), including the number and format of sessions and how participants will be recruited. Explain your strategy for designing the curriculum framework (Task 3), developing content (Task 4), and ensuring quality and inclusivity (Task 5). Describe your approach to **differentiated learning** (learner segmentation, module tagging, prerequisites/equivalencies), the **diagnostic pre-assessment** you propose, and an example **Module-Learner Mapping Matrix** snippet. If any particular instructional design models or tools will be employed (e.g., ADDIE model for curriculum development, or specific e-learning authoring tools), note them here. Demonstrate how each task will be accomplished effectively, and how your approach will result in a high-quality curriculum that meets project objectives. A clear link between the tasks and the deliverables should be evident in your methodology.
- **Work Plan and Schedule:** Present a work plan that translates the methodology into a realistic timeline. Use a table or Gantt chart to show the timing of key tasks, milestones, interim deliverables, and meetings. Indicate the expected start and end dates for major phases of work, keeping in mind any target completion dates noted in Section 6.0. Confirm your ability to meet the timeline requirements (or discuss any adjustments you would propose, with rationale). Include the frequency of progress updates you will provide to BTZx (e.g., bi-weekly calls) and how you will coordinate communications. If you anticipate any periods of intense activity or any potential scheduling risks (and mitigation strategies), note those as well. The work plan should instill confidence that the team can deliver Phase 2 on schedule. Provide confirmation that the Proponent's team will be adequately resourced to execute all deliverables by March 31st, 2026.

- **Project Team and Qualifications:** Introduce the team members who will be involved in this project, their roles, and their relevant experience. Provide an organizational chart or description if multiple organizations are partnering. In the main proposal, include a brief bio for each key individual (a few sentences highlighting credentials, years of experience, and relevant project work). Clearly identify the Project Manager/Lead who will be BTZx's primary contact, and any subject matter experts (e.g., a curriculum specialist, an energy modelling expert) who will play major roles. If the team includes a mix of local and non-local members, clarify how they will collaborate. Note: Full CVs or résumés can be attached as an appendix, but key qualifications should be summarized in the proposal body. Also mention any relevant certifications (e.g., Professional Engineer, CMVP, CEM, or education degrees) and language abilities if relevant (all training will be in English, but note if any bilingual capability exists which could be an asset for future translation considerations). The evaluators will be looking for a team that collectively covers the technical, educational, and project management skill sets required.
- **Relevant Experience and Past Projects:** Describe up to three (3) projects completed by the Proponent that are similar in scope or relevant to this Phase 2 project. For each example, include: the client/organization, the project objectives, the Proponent's role and responsibilities, and the outcomes or deliverables produced. Emphasize any projects involving curriculum or training development in the energy/buildings sector, development of technical training for professionals, or workforce development strategy projects. If possible, draw parallels between those past projects and the requirements of this RFP (e.g., "in project X we developed an online training program for building officials, which is analogous to...."). Include any measurable successes (such as number of participants trained, improved test scores, etc., if known). The aim is to show a proven track record that de-risks your selection for this assignment.
- **Budget Proposal:** Proponents must ensure the all-in budget does not exceed CAD \$200,000 (including HST); present a subtotal (ex-HST) and HST as separate lines and confirm the total including HST. Provide a detailed budget breakdown for the project. The budget should be presented in a clear format (table or spreadsheet) and ideally broken down by task or phase of work. Indicate the hours and fees associated with each team member or role for each task, as well as any direct expenses (e.g., travel, materials, software licenses). Include the hourly or daily billing rates for personnel. Ensure that the total proposed cost is clearly indicated, and align this cost with the expected effort described in your methodology. The budget should also account for any contingency or optional add-ons (if you are proposing optional scope items, price them separately). All applicable taxes (HST) should be noted but can be listed separately from the base

budget. The financial proposal will be evaluated for completeness and value – BTZx is looking for efficient use of resources and a cost that is commensurate with the work.

- **Value-Added Proposition:** Use this section to highlight any additional value your team brings that has not been covered above. This could include unique strengths, innovative tools or processes you will use, or any enhancements to the scope that you propose (and that add benefit without adding significant cost). For example, if your team has developed a proprietary curriculum development framework, or has access to a repository of energy modelling case studies, or will involve a notable industry expert as an advisor, note it here. Also discuss your approach to ensuring the long-term sustainability of the curriculum (e.g., any knowledge transfer to BTZx staff during the project). If your team has a strong local network or community presence that could help with Phase 3 outreach and participant recruitment, you could mention that as well. Essentially, this is where you differentiate your proposal by illustrating how you will deliver superior results or broader impacts (such as capacity building beyond the immediate project deliverables).
- **Appendices:** You may include appendices for supplementary information. Common appendices might be: detailed résumés of team members; a more detailed project plan or Gantt chart (if not fully in the main body); samples of previous work (e.g., screenshots or excerpts of training materials you developed) if allowed and relevant; and any other supporting documentation. Appendices should be clearly labeled and referenced in the proposal text when appropriate (e.g., “see Appendix B for a sample module outline from a previous project”). Keep in mind that evaluators may not review voluminous appendix material in depth, so ensure the main proposal stands on its own with regard to meeting the requirements.

Proposal Format and Submission:

- 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.
- The main body of the proposal (excluding cover letter, title page, and appendices) should not exceed 20 pages. Appendices must be concise and are limited to a maximum of 15 pages in total. The proposal should include a work plan outlining how and when all the tasks will be completed.
- Provide a detailed fixed fee budget including project tasks, team member’s daily or hourly rates, and their intended number of days/hours to work on each project

component. The detailed budget should provide a breakdown of costs by task and a separate line item for any applicable taxes.

- Electronic submission is required. Proposals should be provided as a **single PDF document**. 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.
- Upload an electronic copy to the Net Zero Atlantic- FTP site available at: <https://netzeroatlantic.sharefile.com/r-ra44810cefc7e4b8183098f4477f498e2>

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 Modeller Training Phase 2")

Attention: Ahmad Mezher, BTZx Energy Modeller Training Project

BTZx will compile all questions received by the deadline and post a Q&A document at the same location where this RFP is posted.

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 same location as this RFP will be considered official and authoritative. **BTZx will not distribute the full Phase 1 reports during the solicitation period.**

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 extent to which the Proponent demonstrates a thorough understanding of the project’s objectives, context, and challenges, and the quality of the approach proposed. Evaluators will look for insight into the needs of energy modelling training and how well the methodology addresses each task. A strong proposal will articulate a clear, logical plan for curriculum development, stakeholder engagement, and content creation, showing creativity, comprehensiveness, and feasibility. This criterion also encompasses the Proponent’s understanding of inclusivity and how they plan to incorporate it.
- **Proponent Experience and Qualifications (25%)** – The relevant experience of the firm and the project team in relation to this project. This includes demonstrated success in similar projects (e.g., developing training programs, especially in energy/building sectors; workforce development initiatives; projects in Nova Scotia or with similar energy code contexts). The qualifications of individual team members, as evidenced by their backgrounds and past roles, will be assessed. Past project outcomes can bolster this score. Any partnerships or local expertise will also be considered here. The key is that the team’s collective experience should give confidence in their ability to deliver Phase 2 successfully.
- **Work Plan and Management (20%)** – The realism and clarity of the proposed work plan and schedule. Proposals will be evaluated on how well-organized and achievable the plan is, how well it addresses potential risks or challenges, and the Proponent’s approach to managing the project. This includes adequacy of resource allocation (is the level of effort for tasks reasonable?), timing of deliverables, and coordination/communication plans with BTZx. A proposal that demonstrates a proactive management approach and a solid timeline (with some flexibility for unforeseen adjustments) will score well. The ability to meet the required timeline is critical.
- **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. This includes particularly innovative approaches or tools proposed by the Proponent (for instance, use of an interactive platform for stakeholder engagement, or novel techniques in curriculum development). It also covers the Proponent's commitment to DEIA principles in the execution of the project (e.g., strategies to ensure diverse input or accessible materials) and contributions to local capacity building (such as partnering with local experts or providing training to BTZx staff as part of the project). The overall professionalism and clarity of the proposal itself (presentation quality, absence of errors, coherence) will also influence this criterion. Essentially, this is an opportunity for the Proponent to get credit for any extra value they offer beyond the base requirements.

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

Thank you for your interest in this initiative.