

# Request for Proposals

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## Navigator Training Pilot – Phase 2

RFP Release: Date **October 7th, 2025**

Proposal Due Date: **November 5th, (2:00 p.m. A.T.)**

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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 (RFP) invites qualified proponents to undertake Phase 2 of the Navigator Training Pilot. Phase 2 will build on the completed Phase 1 needs assessment and jurisdictional scan to develop an Atlantic-specific training curriculum, engage with the building industry and run a pilot program for Navigators working in the Part 3 building sector. The ultimate goal is to ensure skilled and sustainable cadre of Navigator professionals capable of supporting the retrofits of Part 3 buildings in the Atlantic region. BTZx seeks a proponent with the expertise to design and pilot an industry-informed, inclusive curriculum that addresses the identified skill gaps and prepares professionals to succeed in supporting deep retrofits across the region.

## 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 for retrofits of existing stock.

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.

## 3.0 Background

**Phase 1** will deliver a region-wide jurisdictional scan and needs assessment to define the retrofit navigator role for Atlantic Canada and to inform curriculum design. The work includes targeted stakeholder engagement across Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland & Labrador (with Indigenous and equity-deserving representation), identification of priority audiences to upskill, mapping of core competencies for Part 3 and complex retrofit contexts, and a review of Canadian and international training models relevant to navigation functions. Findings will translate into practical recommendations on delivery pathways (e.g., micro-credentials, continuing education, post-secondary integration) and clear guidance to avoid duplication and ensure accessibility for working professionals. Outputs will include a draft and final report and a concise presentation of actionable recommendations that directly set up Phase 2 curriculum development and pilot planning.

**The Retrofit Navigator Profession:** Retrofit Navigators have an emerging role in the building sector and can play a pivotal coordination and client-support role in planning and delivering deep energy retrofits, especially for larger, more complex Part 3 buildings. A Retrofit Navigator is a practitioner who helps building owners and asset managers move from high-level intent to executable action by aligning scope, budgets, schedules, incentives, and teams. They translate technical options into clear choices, coordinate energy modelling and audits, support procurement and permitting, and keep projects on track through design, construction, and verification. In Atlantic Canada, where decarbonization targets, Tiered energy codes, and capital planning are accelerating, Navigators reduce friction by connecting owners with qualified professionals and by sequencing activities. Navigators are integrators: they ensure the right analyses are commissioned at the right time, financing and incentive pathways are leveraged, tenants and operators are engaged, and risks to cost, schedule, and performance are actively managed. There is no single licensing body for Retrofit Navigators in Canada; practitioners typically draw on backgrounds in building operations, project

management, engineering, architecture, sustainability consulting, or municipal programs, and build competency through targeted training, micro-credentials, and applied experience. As provinces implement retrofit programs, incentives, and owners pursue portfolio-level decarbonization, Navigators help projects meet energy and emissions targets while maintaining occupant comfort, operational continuity, and financial viability.

**Need for Training and Upskilling:** Across Atlantic Canada the rapid evolution of tiered energy codes, incentive programs, procurement practices, and permitting requirements is raising the bar for day-to-day practice. While there are many courses on energy efficiency and general project coordination, few are tailored to Atlantic realities; utility and government incentive rules, documentation expectations for permits and funding, bilingual service needs in parts of the region, and the logistics of delivering projects in smaller markets and rural/coastal communities. Rather than reinventing the wheel, a clear opportunity exists to curate high-quality materials from other jurisdictions and adapt them for Atlantic codes, climate, and institutional context.

## 4.0 Objective

The objective of this RFP is to secure the services of a qualified consulting team to execute **Phase 2: Curriculum Development and Pilot** of the Navigator Training Pilot Project. Phase 2 will result in a comprehensive training curriculum and pilot tailored to the Atlantic provinces retrofit navigator needs. The selected Proponent will **design, engage stakeholders and deliver** a curriculum that addresses the gaps and recommendations identified in Phase 1. Key objectives and expected outcomes of Phase 2 include:

- **Atlantic Provinces-Specific Curriculum Design:** Develop a complete training curriculum for retrofit navigators that is explicitly aligned with the advancement and industry context. The full Phase 1 materials, including the *Navigator 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. Structure the program with 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 curriculum. The Proponent will identify relevant external courses, content, and resources that can be adapted to Atlantic provinces 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 tools and techniques that may help support the navigator's role. 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 this role 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. Phase 2 outputs must be **LMS-compatible** (e.g., slide decks, videos, and quizzes can be uploaded to an LMS) and 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).

- **Pilot Participant Recruitment & Cohort Assembly:** Lead end-to-end recruitment across the Atlantic provinces, setting clear eligibility criteria and selection rubrics, establishing EDIA (equity, Diversity, Inclusion, and Accessibility) participation targets, and coordinating outreach through industry associations, post-secondary partners, municipalities, and program administrators. Manage intake forms and consent, screen applicants, assemble balanced cohorts by role/sector/region, maintain a waitlist, and provide participant orientation materials and employer letters outlining time commitments and expectations. The pilot must run with a minimum of 20 participants.
- **Structured Stakeholder & Industry Engagement for Curriculum Validation:** Engage sector representatives, post-secondary partners, utilities/program administrators, building officials, owners/operators, and trade bodies from across Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland & Labrador to pressure-test the curriculum and delivery plan. Engagement will be purposeful and time-boxed (e.g., advisory touchpoints, focused roundtables, targeted interviews) and will capture region-specific needs, and incentive documentation practices. The Proponent will synthesise input into clear change logs and incorporate validated feedback into iterative drafts, demonstrating how industry and institutional insights have directly informed content, assessment artefacts, and delivery recommendations.
- **Pilot Delivery & Evaluation in the Atlantic Context:** Plan and deliver the execution of a 4-month time-bound pilot that validates curriculum, delivery pathways, and learner supports across Atlantic provinces. The pilot will specify cohort size and composition, delivery schedules, instructor qualifications, quality-assurance checkpoints, and participant support suitable for working professionals. Materials must be LMS-compatible and accessible for both online and in-person formats. The Proponent will provide an evaluation framework (logic model, KPIs, instruments for pre/post knowledge checks, performance tasks, and satisfaction measures) and analyse anonymised results supplied by BTZx to recommend refinements that give BTZx a clear plan for refining the pilot and delivering a successful program.

By delivering these outcomes, The Phase 2 will enable an expanded and upskilled pool of retrofit navigator professionals, supporting the Atlantic provinces transition to net-zero buildings and compliance with increasingly stringent energy codes.

## 5.0 Scope of Work and Deliverables

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).

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.

## Task 1: Review Phase 1 Findings and Existing Resources

The Proponent will begin by reviewing all relevant Phase 1 documentation for the Navigator Training Pilot, including the Jurisdictional Scan and any interim needs-assessment materials released by BTZx. The goal is to extract a clear understanding of the priority competencies, procedural requirements, and content opportunities for retrofit navigators working in the Atlantic provinces. The delivery 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 gaps.

### *Deliverables:*

- 1.1 Kick-off Meeting:** Within one (1) week of contract award, the Proponent shall participate in a project kick-off meeting with BTZx to review the approach, clarify questions, and confirm expectations. Following the meeting, the Proponent will deliver a concise Work Plan outlining the agreed methodology, timeline with key milestones, targeted engagement approach, and any updated resource needs. This Work Plan will guide Phase 2 activities and be approved by BTZx.
- 1.2 Update Workplan in Accordance with Phase 1 recommendations:** The proponent will review jurisdictional scan completed in phase 1 of the project and will update the workplan in accordance with suggestions and recommendations. The workplan should be signed off by BTZx before moving forward and should stay within the initial budget.

## Task 2: Stakeholder Engagement for Curriculum Design

To ensure the curriculum is practical, regionally grounded, and inclusive, the Proponent will engage key stakeholders as advisors during design. Whereas Phase 1 will capture broad perspectives, Phase 2 will conduct targeted engagement focused on curriculum content, artefacts, and delivery format. The Proponent will advise a Curriculum Advisory Group, created by BTZx, or equivalent mechanism to solicit input and feedback. Membership should reflect the Atlantic context and may include, but it did not limit to owner/asset-manager representatives, facility managers/building operators, experienced retrofit coordinators, an architect or engineer with deep retrofit experience, representatives from utilities/program administrators, commissioning and controls specialists, and individuals representing underrepresented groups and Indigenous communities. The Proponent will facilitate engagement sessions and conduct one-on-one interviews with priority stakeholder types, ensuring at least one participant from a small municipality and appropriate regional balance (NS, NB, PEI, NL). Engagement should gather insights into curriculum content priorities, learning, inclusivity and accessibility, delivery preferences and future-facing topics. The Proponent will document the approach and outcomes in a Stakeholder Input Summary, showing how input will inform the framework and content.

### *Deliverables:*

- 2.1 Stakeholder Input Summary:** Documentation of Task 2 engagement activities and findings. Include who was consulted (by province/role), engagement format (workshop, interview, roundtable), and key feedback relevant to curriculum content, artefacts, accessibility, and delivery preferences. Highlight actionable suggestions and any implications for scope or sequencing.

## Task 3: Curriculum Framework Development

Using insights from Task 1 and Task 2, the Proponent will design a detailed **Curriculum Framework** for navigator training. This framework will define the overall structure (courses, modules, and units), the sequence in which topics will be presented, learning objectives/outcomes for each module, and estimated instructional hours or seat time for each component. It will explicitly map modules to the competencies and gaps

identified for Atlantic practice—ensuring that every major need is addressed by one or more modules—and note where external content will be adapted (including the nature of localizations such as climate, terminology, code and permitting references, and incentive processes). The framework will specify delivery modality options for each module (for example, a 3-hour in-person workshop or two 90-minute online sessions with activities) and embed applied practice through assignments, case studies based on Atlantic projects, simulations, and documentation artefacts. It will be **tool-agnostic by default** while allowing for optional sub-modules to be updated as tools evolve.

**Module–Learner Mapping & Prerequisites:** The framework will include a Module–Learner Mapping Matrix aligning each module to target learner segments (e.g., Owner/Asset Manager representative, Building Operator, Energy Advisor → Navigator transition, Consultant/PM, Municipal/Institutional staff), listing prerequisites/equivalencies and marking modules as foundational, intermediate, or advanced. A concise

**Recognition of Prior Learning (RPL)** policy will indicate credentials/experience that allow placement into advanced modules.

### *Deliverables:*

- 3.1 Curriculum Framework (Outline) Document:** The completed Task 3 framework serving as the blueprint of the program. Include a table of modules (titles, learning outcomes, durations, brief descriptions), delivery modality notes (online/in-person options), prerequisites, and an alignment table showing how modules address Phase 1 gap areas and Atlantic procedural needs (codes, permitting, incentives). Submit a draft for review and a final version incorporating BTZx feedback.
- 3.2 Module–Learner Mapping Matrix (Spreadsheet):** A structured matrix tagging each module with prerequisites/equivalencies, target learner, estimated time, and placement rubric to recommend module selection, deferrals, or exemptions. Designed for pilot use and future refinement.

## Task 4: Content Development

Upon approval of the Curriculum Framework, the Proponent will develop the full curriculum content for each module that is comprehensive of the learning requirements to be a Navigator for Part 3 buildings. This includes presentation decks, detailed lesson plans or instructor notes, participant handouts and readings, exercises with solutions or facilitation guidance, quizzes or knowledge checks, and multimedia elements (e.g., short videos or screen-captures) where appropriate. Content will be written in clear, professional language for adult learners, with technical concepts explained at appropriate depth. The Proponent will implement instructional-design best practices so that each module has explicit objectives, is broken into manageable segments, and uses varied activity types to support learning.

**Differentiated Learning & Pathways:** The Proponent will package content to support diverse backgrounds through clear pathway labelling, plain-language scaffolding, and optional preparatory micro-modules where needed. A short **diagnostic pre-assessment** and placement rubric will recommend which modules a learner should take, defer, or skip, with a **skip/fast-track policy** based on pre-assessment thresholds or recognized credentials. For each learner segment, the Proponent will define an ordered pathway with estimated hours indicating required, recommended, or optional modules.

**LMS Enablement & Accessibility:** Content will be prepared for dual delivery (online and in-person). All materials will meet accessibility best practices (e.g., WCAG-aligned captions, alt text, readable contrast, logical heading structure). Where external materials are leveraged, the Proponent will localize them for Atlantic conditions and obtain suitable permissions or licenses. Iterative development will allow BTZx and curriculum advisory group to provide feedback on sample content prior to finalization. By the end of this task, a **Draft Curriculum Package** (all content in draft form) will be compiled for formal review.

### *Deliverables:*

- 4.1 Draft Curriculum Package:** The full set of **draft** training materials from Task 4 compiled for review: participant materials (presentations, handouts, exercises, case artefacts) and instructor materials (lesson plans, notes) for each module, plus any multimedia (e.g., short videos). Materials should be dual-delivery ready (online and in-person) and prepared for LMS upload (e.g., SCORM/xAPI, PPTX/PDF, MP4). Delivery of this draft must allow for a feedback window and revisions; batching is acceptable, but a consolidated draft package is required.
- 4.2 Training Pathways Guide:** A guide that presents recommended learning paths by background. Use plain language, flow diagrams, and show required/recommended/optional items, estimated hours, delivery formats, and whether each item is a BTZx offering or an external recognized option. This guide supports outreach and clarity for employers and learners.

## Task 5: Review, Testing, and Finalization

The Proponent will work with BTZx to refine curriculum content and ensure readiness for delivery. The Draft Curriculum Package will undergo a structured review by BTZx and, where appropriate, the Curriculum Advisory Group established in Task 2. The Proponent will collect and incorporate feedback, correct errors, clarify content, and improve materials to maximize effectiveness. If feasible within scope, BTZx and the Proponent may conduct an internal table-top walkthrough of selected modules to validate flow and comprehension; insights will be used for final adjustments. The Proponent will complete quality assurance to verify technical accuracy and proofread all materials. Supporting will be finalized and included. The Proponent will produce a **Final Curriculum Package** with consistent formatting and deployment-ready files, accompanied by an **Implementation Plan** that provides guidance to future instructors on recommended pacing, session setup, required materials or software, and notes on facilitating applied activities.

### *Deliverables:*

- 5.1 Final Curriculum Package (Atlantic Retrofit Navigator Training):** The definitive, deployment-ready set of Phase 2 curriculum materials, revised per feedback. Provide all slide decks, instructor guides, participant handouts, exercise files, assessment tools (quizzes/checks), and supporting artefacts (e.g., sample owner decision briefs, scope/sequence maps, incentive/permit submission samples, M&V checklists). Supply both delivery formats (PDF/PPT, etc.) and **editable source files**. Include a Module Catalogue/index listing each item and purpose. All digital files must meet accessibility best practices (WCAG-aligned headings, alt text, captions, readable contrast).
- 5.2 Instructor/Implementation Guide:** An accompanying manual to support consistent delivery in Phase 3. Include recommended schedules (e.g., multi-week online vs. intensive in-person variants), preparation requirements (software, room setup), guidance for facilitating applied activities, assessment notes, completion criteria, and practical tips for managing busy working-professional cohorts.

## Task 6: Pilot Participant Recruitment and Cohort Assembly

The Proponent will **lead end-to-end recruitment** across the Atlantic provinces to assemble pilot cohorts aligned with the target audience and EDIA objectives. Work will include defining eligibility criteria and selection rubrics; setting regional and sector participation targets; coordinating outreach through industry associations, utilities/program administrators, municipalities, post-secondary partners, and professional networks; and producing clear outreach copy and application materials. The Proponent will manage intake forms and consent, screen applicants, assemble balanced cohorts by role/sector/region, maintain a waitlist, and provide orientation materials and employer letters outlining time commitments and expectations.

*Deliverables:*

- 6.1 Pilot Recruitment Package & Cohort Assembly Report:** A complete set of recruitment materials (public copy, application form, eligibility criteria, selection rubric, employer letters) and a brief report documenting outreach channels used, applications received, selection outcomes, EDIA/region targets achieved (NS, NB, PEI, NL), and final cohort composition. Include participant orientation materials.

## Task 7: Pilot Readiness, Delivery, and Evaluation

In collaboration with BTZx, the Proponent will prepare for delivery by confirming schedules, finalizing the course and materials in the LMS, and completing a pre-launch quality-assurance checklist. The Proponent will deliver the pilot, operate or support operation of the learning platform during sessions, and provide routine learner support. The Proponent will apply an evaluation framework tailored to the pilot, including a logic model, key performance indicators (participation, completion, knowledge gain, skills application, satisfaction), and instruments such as pre- and post-assessments, performance task rubrics, brief surveys, and structured interviews or focus groups. Data will be collected ethically with appropriate consent and safeguarded under agreed privacy practices. The Proponent will analyze results against targets and produce clear recommendations to refine the curriculum, artefacts, and delivery model prior to broader rollout.

*Deliverables:*

- 7.1 Pilot Readiness & QA Checklist:** A pre-launch checklist confirming LMS course readiness, file packaging, accessibility checks, schedules, facilitator assignments (as applicable), and any risk mitigations in place. Provide a brief readiness memo summarizing status and residual risks.
- 7.2 Pilot Evaluation Framework & Instruments:** A fit-for-purpose evaluation plan including a logic model, KPIs (participation, completion, knowledge gain, skills application, satisfaction), and instruments (pre/post checks, task rubrics, brief surveys, interview/focus-group guides). Include data-collection instructions and privacy/consent language suitable for BTZx administration.
- 7.3 Pilot Evaluation Report:** A post-pilot analysis summarizing participation and retention, learning outcomes against targets, satisfaction insights, operational observations, barriers, and concrete recommendations for curriculum/content adjustments, artefact improvements, and delivery refinements prior to broader rollout.

## Task 8: Handover and Maintenance Guidance

Following pilot evaluation, the Proponent will incorporate validated changes and provide BTZx with all source files and packaging required for ongoing delivery. A brief maintenance note will recommend how to keep the curriculum current as codes, incentives, and tools evolve, and how to integrate optional tool-specific sub-modules over time without disrupting core, tool-agnostic content.

*Deliverables:*

- 8.1 Presentation of Results:** A final presentation to BTZx (and, at BTZx's discretion, a broader stakeholder audience) summarizing Phase 2 outputs: curriculum structure and rationale, how Atlantic-specific needs and Phase 1 insights were addressed, pilot recruitment and evaluation results, and recommendations for next steps. Provide the slide deck to BTZx.
- 8.2 Project Documentation & Handover:** Transfer all supporting documents and files produced during Phase 2, including raw consultation notes (for BTZx records), the external resource inventory with licensing/permission details, draft iterations as needed, LMS-ready packages and source



files for any e-learning artefacts, and a concise cover memo listing all deliverables and affirming completion. Confirm BTZx has full rights to use and modify the content going forward.

## Ongoing Collaboration

Throughout Phase 2, BTZx will lead overall project management. The Proponent will maintain regular communication with the BTZx project manager, attend scheduled check-ins, and provide interim drafts and memos according to the agreed cadence so that issues are addressed promptly and the project remains on schedule.

## 6.0 Project Timeline

The consultant will begin work in early December 2025 and must submit all final deliverables no later than February 28, 2027. The timeline outlined below is intended to guide planning and ensure deliverables align with broader project milestones.

Activity	Date Range
RFP 2 release date	October 7, 2025
RFP 2 Q&A period close	October 29, 2025, 2pm AST
RFP 2 - Proposals due	November 5, 2025, 2pm AST
Contract awarded	November 28, 2025
Curriculum Framework Development kick off (D1.1)	December 4, 2025
Final Report and Presentation for Phase 1: Jurisdictional scan; Phase 1 Handover session	December 15, 2025
Update Workplan in accordance with Phase 1 Jurisdictional scan (D1.2)	January 12, 2026
Curriculum Framework development and Learner Mapping Matrix (D3.1-D3.2)	January – March 2026
Stakeholder Engagement Sessions (D2.1)	January-June 2026
Development of Program Content and Pathways (D4.1-D4.2)	April – May 2026
Instructor recruitment (D5.2)	May 2026
Participant recruitment (D6.1)	June-August 2026
Finalization of Curriculum (D5.1)	July 2026
Pilot Preparation and Organization (D7.1-D7.2)	April-August 2026
Pilot Delivery (D7.3)	September-December 2026
Project Wrap up (D8.1-D8.2)	January-February 2027

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 expect 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.

## 7.0 Project Funding

Funding for the project is **capped at a maximum of \$120,000.00 CAD**, inclusive of all applicable taxes, fees, and expenses. This amount is intended to cover the full scope of work over the contract period (December 2025 to February 2027).

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.

## 8.0 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 curriculum development, training, 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

- Knowledge of available funding and financing options for building retrofits.

#### Equity, Diversity, and Inclusion (EDIA) Orientation:

- Commitment to creating accessible, inclusive communications that respect cultural diversity, language differences
- 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 development and 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.

## 9.0 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 curriculum development and training approach to stakeholder engagement (proposed consultation format, number of sessions, recruitment strategy for participants). If any 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 6.0. 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. Additional materials included in appendices should not exceed 10 pages.

## 10.0 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
<b>Understanding &amp; Approach</b>	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.
<b>Workplan</b>	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.
<b>Budget</b>	20 pts	Realistic and cost-effective budget aligned with deliverables.
<b>Relevant Experience</b>	10 pts	Clear examples of previous work relevant to the project scope and target audience.
<b>Team Qualifications</b>	15 pts	Demonstrated expertise, roles clearly defined, and team capacity to deliver.
<b>Innovation and value added</b>	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 EDIA 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.

## 11.0 Questions and Clarifications

The Building to Zero Exchange will accept content-related questions from interested applicants on an ongoing basis until **October 29, 2025, at 2 p.m. AST**. Please email [stseng-rhoades@buildingtozero.ca](mailto:stseng-rhoades@buildingtozero.ca) with any question prior to this date. Additionally, a Q&A page will be available on the [news section of 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.

## 12.0 Submission Instructions & Deadline

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. All proposals must be submitted electronically as a **single PDF document** and include:

- A cover letter, signed by an authorized officer of the Proponent's organization, that confirms that the information provided is accurate and that the signatory has authority to bind the Proponent.
- 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.

### Submission Method:

Submit proposals [HERE](#)

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

### Submission Deadline:

**November 5th, 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.

## 13.0 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.