

Prequalification for Comprehensive Market Assessment (CMA) Invite

Issued: November 5, 2024

Due: November 22, 2024

Reference: 24-045/1

Submit Proposals To

Attn: Finance & Corporate Services
Email: corporateservices@cagbc.org
Format: PDF

Key Dates

Procurement Action Item	Date
Posting/Issue Date	Tuesday, November 5, 2024
Question Period Deadline	Monday, November 11, 2024
Addendum 1 Posting	Thursday, November 14, 2024
Addendum 2 Posting	Tuesday, November 19, 2024
Submission Deadline/Closing Date	Friday, November 22, 2024
Notification of Prequalification Results	Friday, November 29, 2024

Submission Details

All submissions responding to the invitation for prequalification must be emailed in PDF format to corporateservices@cagbc.org no later than November 22, 2024, at 2:00 pm ET.

Where no notice is given, the Canada Green Building Council (CAGBC) copyrights all information contained herein.

Submission questions

Interested proponents can submit clarification questions related to the invitation for prequalification by email to corporateservices@cagbc.org up to and including November 11, 5:00 pm ET.

In its sole discretion, CAGBC may choose to consolidate responses or not address submitted questions for any reason whatsoever.

Overview

The Canada Green Building Council (CAGBC) is a non-profit organization that collaborates with the building, real estate, finance, and government sectors to realize the value of green buildings.

At CAGBC, we work with these stakeholders to accelerate their sustainability efforts and mitigate climate change risks for new and existing buildings. As a member-driven organization, we provide tools, training, research, and services to integrate sustainability, resilience, and carbon reductions into real estate decision-making.

CAGBC's building standards and certification programs enable the disclosure and accountability of building assets and operations in line with evolving investor, occupier, and public policy expectations, especially regarding carbon.

To keep up with changing market needs, CAGBC requires a Comprehensive Market Assessment that involves a detailed evaluation of various factors to understand the market dynamics, opportunities, and competitive landscape.

Purpose

CAGBC is issuing this Prequalification for companies/consultants with demonstrated experience delivering Comprehensive Market Assessments (CMA) of organizational strategies.

The prequalification invites proponents (i.e., individual firms, combinations of firms, and/or independent practitioners) with experience in risk, market and opportunity assessment, market analysis, and strategic planning to apply.

Successful pre-qualified proponents will be invited to respond to a formal Request for Proposals (RFP) to complete a Comprehensive Market Assessment (CMA) in support of CAGBC's strategic needs.

CMA Considerations

The CMA is expected to take into consideration CAGBC's preliminary strategic needs:

1. **Drive Industry Decarbonization Efforts:** Provide impactful solutions that guide the industry through the transition to decarbonized operations for new and existing buildings.
2. **Expand Green Building Adoption:** Catalyze the adoption of green building practices through wholistic rating systems, targeted learning, industry events, and flexible engagement opportunities.
3. **Build Market Capacity:** Provide timely market research, tools, resources and capacity-building initiatives to support scaling green building practices.

4. **Elevate Influence:** Enhance standing as a trusted advisor and industry leader capable of influencing policies and supporting the industry.
5. **Collaborate to Maximize Impact:** Leverage partnerships with like-minded organizations to amplify the value of green buildings and drive industry solutions.

Scope of Work

The phased comprehensive market assessment (CMA) will evaluate the building sector industry landscape related to green building. It will seek to identify the major trends and drivers impacting CAGBC's core target and market segments and provide a baseline for comparison and evaluation. Through an expansive analysis, the CMA will seek to situate CAGBC within the market relative to similar organizations. Additionally, the CMA is expected to explore financial and market supply and demand directions in more detail and conduct risk assessments to facilitate mitigation strategies. The CMA should also include stakeholder mapping to categorize organizations of interest, influence and partnership opportunity. This analysis aims to provide actionable insights for strategic planning and growth opportunities.

Pre-Qualification Requirements

The expected minimum level of skills, knowledge, and/or abilities of the applicant should include:

Overarching:

- Ten (10)+ years of relevant experience in consulting, technology strategy, process improvement, change management, and strategic planning.
- Proven experience conducting market assessments within the green building sector or related real estate and construction industries within North America, with preference given to Canada.
- In-depth knowledge of the trends, drivers, and challenges impacting the building sector related to green building, including global and national frameworks, standards, and disclosure and regulatory reporting.
- Demonstrated strong communication, facilitation, project management, and interpersonal skills.
- Possess a comprehensive understanding of strategic planning principles, frameworks, and comprehensive market assessments that facilitate and drive organizational objectives.

Strategic Comparative and Competitive Analysis

- Expertise in performing comparative analyses of organizations within the sustainability sector, with the ability to position CAGBC relative to peers and other organizations.
- Ability to develop market positioning insights and benchmarks that inform CAGBC's strategic initiatives and opportunities for growth.

Financial and Market Dynamics Assessment

- Demonstrated ability to evaluate financial, supply, and demand trends in sustainability markets, focusing on the green building industry.

- Experience conducting risk assessments and providing mitigation strategies based on comprehensive market and financial data analysis.

Stakeholder Mapping and Partnership Opportunities

- Proven capability in conducting stakeholder mapping and categorizing organizations by influence, interest, and partnership potential.
- Expertise in identifying partnership and collaboration opportunities that align with strategic goals in sustainability and green building.

Actionable Insights and Strategic Recommendations

- Ability to deliver data-driven, actionable insights that directly inform strategic planning, growth, and market positioning efforts.

Advanced Analytical Tools and Innovation in Market Research

- Demonstrated use of cutting-edge analytical tools and methodologies, such as AI-driven market forecasting, data visualization platforms, or predictive modelling, to enhance the depth and accuracy of market assessments.
- A proven track record of innovative approaches in market research that go beyond traditional methods, offering clients unique insights and competitive advantages.

Terms and Conditions

1. Information throughout the application process should be considered confidential.
2. Chosen proponents will be asked to respond to an RFP and might be asked to sign a non-disclosure agreement (NDA) before receiving the RFP.
3. All information, recommendations and reports prepared as part of the agreement will become the exclusive property of CAGBC. Proponents should be prepared to license materials used and created during the agreement with CAGBC.
4. The CAGBC is not bound to choose any submitted proponent to respond to an RFP.

Submission Structure and Evaluation Criteria

Successful pre-qualified proponents will be invited to respond to an RFP based on a balance of criteria, including expertise, experience, and cost.

Submission Format

Prequalification Proposal - Submission Structure/Format	Page Limit
<p>All documents should be submitted as PDF.</p> <p>Please Note: Submissions exceeding the indicated Page Limit for any section will have extra pages redacted/removed which will not be eligible for evaluation.</p>	

Page Restrictions <u>do not</u> apply to a Cover Page, Table of Contents, Appendix A and/or Appendix B under the Supplementary Materials section, which will be variable.	
1: Executive Summary	1
a) Provide a brief overview of the firm’s qualifications and key differentiators relevant to a CMA.	
b) Highlight your experience and approach to addressing CAGBC’s strategic considerations.	
2. Company Profile, Experience & Qualifications	4
a) Company background, including history, mission, and services offered.	
b) Overview of your team, with profiles of key personnel who will contribute to this project, including their relevant experience.	
c) Detailed explanation of relevant experience in consulting, market analysis, and strategic planning.	
3. Approach & Methodology	3
a) A high-level description of the proposed approach to conducting a CMA, including: <ul style="list-style-type: none"> i. Conveying how the approach will address CAGBC’s strategic considerations. ii. Suggested key phases of the assessment. iii. Types of methodologies for evaluating market trends, financial dynamics, and stakeholder opportunities. iv. Possible tools and technologies that will be used. (AI-driven forecasting, data visualization, etc.) 	
b) Plan, if any, for stakeholder engagement and any collaboration strategies.	
4. Project Value, Management & Timeline	1
a) An impact/effort assessment and budget range (i.e. High-level cost estimates for each proposed phase and aggregate).	
b) Describe the project management approach, timeline, and key deliverables. <ul style="list-style-type: none"> i. NB: CMA is anticipated to commence in January 2025 and conclude in June 2025. 	
6. References	1
a) Three examples and associated references that demonstrate experience with a CMA. <ul style="list-style-type: none"> i. The examples should showcase expertise in one or more of the following: Conducting market assessments for green building or related industries, simplifying complex processes, enhancing customer experience, and/or highlighting significant improvements achieved. ii. References for each example should include email and phone numbers from past clients on similar projects. 	
7. Appendix A – Submission Form	N/A
a) This form is to be filled out in its entirety and signed by an authorized representative. Any form that is incomplete will result in a Fail status for Stage 1 as per the Evaluation Criteria listed below. Please label Appendix	

A.	
8. Supplementary Materials	Variable
a) The CV of the proponent or multiple CVs if multiple team members will provide services. Please submit as a single/combined PDF and label Appendix B.	

Proposal Evaluation Criteria

CAGBC will evaluate all submissions using the following weighted system:

Stage 1: Mandatory Submission Requirements	(Pass/Fail)
<i>Proponents must receive a PASS in Stage 1 to proceed to Stage 2.</i>	
<i>To receive a PASS in this evaluation stage, the Proponent's Submission must be complete and compliant with the Mandatory Submission Requirements below.</i>	
1. Prequalification Proposal	
Submission File 1: The Prequalification Proposal is not to exceed 10 pages, <u>not</u> including the cover page, table of contents, Appendix A and/or Appendix B – Team Member CVs. CAGBC will not review any pages exceeding the stipulated 10 pages.	Pass/Fail
2. Appendix A - Submission Form	
Submission File 2: Prequalification Proposal Submission Form. Satisfactorily completed and signed, presenting no risks to CAGBC. Should be attached as a separate PDF file. Label Appendix A.	Pass/Fail
3. Team Member CVs	
Submission File 3: All anticipated Team Member CVs in a single/combined PDF file. Label Appendix B.	Pass/Fail
Stage 2: Prequalification Proposal Evaluation	
(100%)	
Section A: Executive Summary	
5%	
1. Concise overview of qualifications and differentiators relevant to CAGBC's needs.	
2. Clear connection to CAGBC's strategic priorities.	
Section B: Company Profile, Experience & Qualifications	
60%	
1. Clear company background and alignment with green building values.	
2. Team expertise and relevant experience in consulting and market analysis.	
3. Demonstrated success in relevant projects, especially in green building or similar fields.	
Section C: Approach & Methodology	
15%	
1. Feasibility of proposed approach and alignment with CAGBC's goals.	

2. Clear assessment phases and advanced tools. (e.g., AI, data visualization).	
3. Stakeholder engagement and collaboration strategies.	
Section D: Project Value, Management & Timeline	10%
1. Transparent impact/effort assessment with cost estimates.	
2. Effective project management approach, realistic timeline, and clear deliverables.	
Section E: References	10%
1. Relevant project examples with proven results.	
2. Reliable references with complete contact information.	