

Subject Matter Experts – Consultant Services

Request for Standing Offers (RFSO)

Procurement Details	Details
Issue Date	May 13 th , 2025
Submission Deadline	June 20 th , 2025
Reference	25-029

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1. Introduction

1.1 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 interested parties 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.

1.2 Purpose

The purpose of this RFSO is to identify and engage a pool of Subject-Matter Experts (SMEs) to provide expert knowledge and guidance in areas critical to achieving the goals and objectives of CAGBC's projects, research and learning. The selected SMEs will support CAGBC in developing effective strategies, advancing research, developing and delivering education, and advancing high-performance building standards. CAGBC welcomes proposals from various Subject-Matter Experts as detailed in section 2. **Requirements - Priority Group(s)**.

2. Requirements

2.1 Priority 1 Groups

2.1.a) Strategy & Communication Specialists

Service Category	Desired/Preferred Expertise
Strategy/Managing Consultants	<ul style="list-style-type: none">▪ <i>Demonstrated experience in developing business strategies, risk mitigation, business services optimization and long-term planning frameworks.</i>▪ <i>Ability to adapt corporate strategy to not-for-profit and mission-driven organizations.</i>

	<ul style="list-style-type: none"> ▪ <i>Skilled in facilitating strategic planning sessions and collaborative workshops.</i>
Technical/Business Writers & Translators	<ul style="list-style-type: none"> ▪ <i>Proficiency in writing clear, structured technical and business content.</i> ▪ <i>Experience developing documentation such as reports, frameworks, and proposals.</i> ▪ <i>Capacity to deliver accurate and culturally appropriate English/French translations.</i>
Proposal Writers	<ul style="list-style-type: none"> ▪ <i>Proven ability to craft compelling, results-oriented proposals.</i> ▪ <i>Strong understanding of project goals, stakeholder needs, and funding agency expectations.</i> ▪ <i>Expertise in translating complex or technical content into persuasive and accessible language.</i>

2.1.b) Building Performance & Sustainability Experts

Service Category	Desired/Preferred Expertise
Building Performance Consultants	<ul style="list-style-type: none"> ▪ <i>Deep knowledge of energy, water, and systems performance in buildings.</i> ▪ <i>Experience in decarbonization retrofits and long-term planning at asset and portfolio levels.</i> ▪ <i>Ability to provide actionable insights to optimize operational efficiency.</i>
Sustainability Consultants	<ul style="list-style-type: none"> ▪ <i>Expertise in integrating sustainability into building design and operations.</i> ▪ <i>Proven history with carbon reduction strategies and transition planning.</i> ▪ <i>Knowledge of retrofit solutions for various building types.</i>
Energy Efficiency Specialists	<ul style="list-style-type: none"> ▪ <i>Demonstrated ability to conduct energy audits and implement performance upgrades.</i> ▪ <i>Experience managing retrofit projects and tracking efficiency gains.</i> ▪ <i>Familiarity with utility incentive programs and measurement tools.</i>
Green Building Architects	<ul style="list-style-type: none"> ▪ <i>Background in designing high-performance, sustainable buildings.</i> ▪ <i>Knowledge of green design principles, materials, and certification pathways.</i> ▪ <i>Ability to integrate sustainability goals into architectural solutions.</i>
Renewable Energy Experts	<ul style="list-style-type: none"> ▪ <i>Technical expertise in renewable energy systems (e.g., solar, geothermal, wind).</i> ▪ <i>Experience designing and implementing on-site renewable energy solutions.</i> ▪ <i>Understanding of grid integration and lifecycle performance.</i>

LEED Accredited Professionals (LEED AP)	<ul style="list-style-type: none"> ▪ <i>Advanced understanding of the LEED rating system and sustainable building practices.</i> ▪ <i>Experience guiding projects through LEED certification.</i> ▪ <i>Ability to provide compliance strategies across multiple rating system versions.</i>
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2.2 Priority 2 Groups

2.2.a) Policy, Regulatory & Market Experts

Service Category	Desired/Preferred Expertise
Building Codes & Standards Experts	<ul style="list-style-type: none"> ▪ <i>Deep knowledge of green building codes and sustainability standards across federal, provincial, and municipal jurisdictions.</i> ▪ <i>Ability to assess compliance pathways and policy impact.</i>
Environmental Policy Analysts	<ul style="list-style-type: none"> ▪ <i>Experience in policy development and impact evaluation related to building sustainability and decarbonization.</i> ▪ <i>Strong analytical and regulatory awareness.</i>
Government Relations Professionals	<ul style="list-style-type: none"> ▪ <i>Skilled in navigating public policy processes and political environments.</i> ▪ <i>Proven ability to build and manage relationships with policymakers and regulators.</i>
Urban Planners with Sustainability Focus	<ul style="list-style-type: none"> ▪ <i>Expertise in applying sustainable development principles to municipal planning.</i> ▪ <i>Understanding of land use strategy, planning tools, and local sustainability policy levers.</i>
Sustainable Finance Specialists	<ul style="list-style-type: none"> ▪ <i>Knowledge of investment strategies, sustainable finance mechanisms, and disclosure frameworks (e.g., TCFD).</i> ▪ <i>Ability to connect owners to funding and assess financial viability.</i>
Housing/Real Estate/Green Building Market Specialists	<ul style="list-style-type: none"> ▪ <i>Background in housing affordability, design, and development policies.</i> ▪ <i>Experience addressing sustainability issues across market and non-market housing sectors.</i> ▪ <i>Experience analyzing market dynamics, strong understanding of valuation, appraisal, financing.</i> ▪ <i>Experience analyzing employment, GDP, and/or market trends to understand green building economic impact.</i> ▪ <i>Experience and understanding of the costs of green building and business case for green building.</i>

2.2.b) Stakeholder Engagement & Capacity Building

Service Category	Desired/Preferred Expertise
Community & Stakeholder Engagement Specialists	<ul style="list-style-type: none"> Skilled in designing inclusive, trust-building engagement processes. Experience with public consultation, surveys, facilitation, and consensus-building on green building issues.
Training & Capacity Building Facilitators	<ul style="list-style-type: none"> Ability to develop and deliver training programs on green building tools, certifications, and policy updates. Experience working with industry and community-based learners.
Workforce Development Specialists	<ul style="list-style-type: none"> Expertise in skills gap analysis, curriculum development, and workforce transition for green trades and professions. Knowledge of post-secondary and trades training ecosystems.
Indigenous Relations & Reconciliation Advisors	<ul style="list-style-type: none"> Skilled in building respectful partnerships with Indigenous organizations. Familiar with Indigenous knowledge systems and reconciliation practices within built environment work.

2.2.c) Specialized Strategic & Market Services

Service Category	Desired/Preferred Expertise
Marketing & Communications Advisors	<ul style="list-style-type: none"> Ability to translate complex material into professional and public-facing content. Skilled in campaign design and industry positioning for sustainable development.
Digitization & AI Optimization Experts	<ul style="list-style-type: none"> Experience in applying digital tools and AI for building performance tracking, reporting, or market analysis. Skilled in streamlining processes through automation.
Management & Business Optimization Consultants	<ul style="list-style-type: none"> Proven track record in strategic planning, organizational design, process mapping, and risk mitigation. Experience with nonprofits and mission-driven organizations. Experience with evaluating programs and projects to identify successes, lessons learned and repositioning.
Sustainability Reporting & Transition Planning Experts	<ul style="list-style-type: none"> Deep knowledge of ESG reporting (e.g., ISSB, GRESB, TCFD), transition strategies, and emissions disclosure for real estate portfolios.
Real Estate Valuation & Market Analysts	<ul style="list-style-type: none"> Skilled in assessing market trends, asset valuation, and green premium/discount impacts. Understanding how sustainability features affect market positioning.
Economic & Business Case Specialists	<ul style="list-style-type: none"> Experience developing clear, data-backed economic models and ROI narratives.

	<ul style="list-style-type: none"> ▪ <i>Ability to translate sustainability strategies into investable and fundable business cases.</i>
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2.3 Scope of Work (Thematic Areas & Outputs)

The thematic areas covered by the list of SMEs stated above include a wide range of topics essential to advancing green building and sustainability in Canada. These include:

- Transition planning and decarbonization strategies for buildings and portfolios.
- High-performance codes and regulations.
- Development of low- and zero-carbon building standards such as CAGBC's ZCB.
- Market advancement through insights on trends and financing.
- Workforce development, including training and education to enhance green building skills.
- Sustainable housing.
- Sustainable finance.
- Advocacy at various government levels.
- Business strategy for organizational growth.
- Indigenous relations and reconciliation to ensure inclusive and respectful sustainability practices.

The selected SMEs will contribute expertise through the following types of **outputs**:

Output	Description
Document Development	<i>Contributing (through writing or editing) to the development of guides, frameworks, manuals, playbooks and/or reports for diverse audiences within the building and energy sectors.</i>
Learning Materials	<i>Developing educational materials (i.e. PowerPoints, lectures, curricula) for synchronous and asynchronous online learning content and in-person workshop and delivering education.</i>
Proposals	<i>Contributing to the development of activities, theories of change, and overall narratives for new project proposals.</i>
Facilitation	<i>Supporting CAGBC initiatives through facilitating advisory group, volunteer or relevant project meetings to support project outcomes.</i>
Expert Guidance	<i>Serving as an expert advisor to provide subject matter expertise during the development of project scopes, research reports, or project implementation.</i>
Translation & French Language Content	<i>Translating documents and learning materials relevant to green building into French and providing guidance on developing relevant, clear French-language reports and learning materials on green building.</i>
Curriculum Development & Educations Program Design	<i>Designing and structuring comprehensive training programs and curricula to support the development of green building knowledge and skills across various professional levels.</i>

2.4 Specifications/Standards

To be considered for CAGBC's pool of SMEs, Proponents should possess the following minimum level of skill, knowledge, and experience:

2.4.a) Technical Expertise:

- Strong knowledge of the **Canadian** green building context, including relevant policies, trends, challenges, and relevant groups.
- At least five (5) years of experience advancing impactful deliverables for relevant audiences in one or more of the Thematic Areas identified above.
- Demonstrated impact and recognition in the green building field, through participation in advisory groups, conferences, and/or working groups.

2.4.b) Project Management Skills/Other:

- Strong project management abilities, including planning, execution, and monitoring.
- Experience delivering one or more of the types of Outputs identified above, leading to results and impact in the green building sector.
- Experience working with a range of groups for input and feedback into deliverables, and/or socializing deliverables for relevant audiences.
- Excellent communication, facilitation, and interpersonal skills.

3. Submission Instructions

3.1 Key Dates

CAGBC reserves the right to adjust these dates as its sole discretion

Index	Procurement Activity	Date & Time
1	Issue Date (Merx & CAGBC Website)	May 13, 2025
2	Deadline for Questions	May 28, 2025 5:00 PM ET
3	Deadline for Addenda	June 2, 2025 12:00 PM ET
4	Submission Deadline	June 20, 2025 5:00 PM ET
5	Anticipated Notification Date for Priority 1 Groups	July 31, 2025
6	Anticipated Notification Date for Priority 2 Groups	August 29, 2025

3.2 Submission Method

All proposal submissions for this Request for Standing Offer (RFSO) must be **emailed** to corporateservices@cagbc.org no later than **June 20th, 2025**, at 5:00 PM ET.

3.3 Required Submission Format

The Technical Proposal and required Appendices are to be submitted in **PDF format**; and will be considered separate from the Financial Proposal to be submitted as an **Excel** file.

3.4 Inquiries

Interested Proponents can submit clarification questions related to this RFSO by email to corporateservices@cagbc.org up to and including **May 28th, 2025**, at 5:00 PM ET.

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

4. Terms & Conditions

1. Information provided throughout the application process will be treated as confidential by CAGBC.
2. Upon award, the successful Proponent(s) will be retained using CAGBC’s Master Service Agreement (MSA).
3. All information, recommendations and reports will become the exclusive property of CAGBC. Proponents should be prepared to provide copyright to CAGBC of any materials used and created during the term of the agreement.
4. CAGBC is not bound to choose any of the submitted proposals.
5. Successful Proponent(s) may be required to sign a Conflict of Interest and Non-Disclosure agreement at CAGBC’s discretion.
6. Key success factors include on-time and on-budget delivery, responsiveness, and approval of the quality of work from CAGBC senior management.

5. Evaluation Process

5.1 Stage 1 - Format & Submission Requirements

Proponents are only permitted to submit **ONE** proposal, but Proponents may apply under **multiple** services, thematic areas, and/or outputs, as should be indicated in the Executive Summary.

Stage 1: Mandatory Submission Requirements		(Pass/Fail)
Proponents must receive a PASS in Stage 1 to proceed to Stage 2.		
To receive a PASS in this evaluation stage, the Proponent’s Proposal must be complete and compliant with the Mandatory Submission Requirements below.		
1. RFSO Proposal Submission Form – Appendix A PDF		
Submission File 1: RFSO Proposal Submission Form (satisfactorily completed and signed, presenting no risks to CAGBC). See Appendix A.		Pass
2. Technical Proposal PDF		
Submission File 2: Technical Proposal submitted as a single PDF.		Pass

Important: The Technical Proposal File 1 – Must <u>not</u> contain Financial Proposal information or the Proponent's Proposal will be disqualified.	
3. Financial Proposal – Appendix B Excel	
Submission File 3: Financial Proposal – must be submitted using the provided Appendix B template.	Pass
4. Curriculum Vitae – Appendix C PDF	
Submission File 4: Please include the CVs of any pertinent Team Members consolidated into a single PDF file.	Pass

5.2 Stage 2 – Evaluation Criteria

The selection process will be based on a balance of criteria, including expertise, experience, and cost. CAGBC will evaluate all submissions using the following weighted system:

Stage 2: Technical and Financial Proposal Evaluation	(100%)
Section A: Executive Summary	10%
A1: Provide the Proponent's firm background. Please include/consider the following: <ul style="list-style-type: none"> a) This section should not exceed 2 pages. b) Include an introduction and a brief history, including the year the business/organization was established. c) Provide a description of your organization's customer service approach and general mission statement. d) Clearly list any core competencies and services that can be provided by the Proponent. Please be sure to identify any thematic areas and/or outputs as outlined in section 2.3 of the RFSO. 	
A2: Provide an organizational chart of the Proponent's team. <ul style="list-style-type: none"> a) This section should not exceed 1 page. b) Please include the reporting relationships between all team members (Team Lead and all Key Team Members) <p>*Note: If the Proponent is an individual/sole proprietor this requirement may be waived.</p>	
Section B: Qualifications/Thematic Area or Output	35%
B1: Example Projects <ul style="list-style-type: none"> a) This section allows for 2 pages per identified thematic area/output. b) Provide summaries of two (2) relevant projects completed in the last 5 years, per identified thematic area/output. c) All examples should be Canadian based projects. d) The examples provided should demonstrate considerable, direct, expertise with identified services, thematic areas, and/or outputs listed in the RFSO. 	

e) The narrative summary should explain how the Proponent's experience and approach were instrumental in the success of project deliverables.	
B2: References a) This section should not exceed 1 page. b) Provide three (3) appropriate references per identified thematic area/output.	
Section C: Functional Approach	30%
C1: Workplan a) This section should not exceed 3 pages. b) Present a workplan on how services are generally delivered within an identified thematic area/output. Be sure to include: i. An overview on the ability to meet CAGBC needs. ii. Anticipated contribution from CAGBC for services c) Include any appropriate methodologies and/or tools and explain how they are aligned with best practices or industry standards. d) List any efficiencies, innovations, or added-value elements that are unique to the Proponent and/or demonstrates capacity to handle projects within their defined thematic areas/outputs.	
C2: Communications and Reporting a) This section should not exceed 1 page. b) Describe how potential project deliverables, milestones, updates, etc. will be communicated to CAGBC. c) Outline the general frequency of status updates during the delivery of any given project relevant to the priority or size of a project.	
C3: Quality Control a) This section should not exceed 1 page. b) Describe any measures/mechanisms in place for ensuring quality and consistency of deliverables. c) Please indicate any potential risks within thematic areas/outputs based on experience and any strategies used by the Proponent to mitigate those risks.	
Section D: Financial Proposal	20%
D1: Overview of Standard Rates a) Roles & Rates for services per thematic area/outputs.	
Section E: Team Member Qualifications	5%
E1: Please provide the Curriculum Vitae (CVs) of any Team Members that will be engaged on projects. a) CVs should not exceed 2 pages for each Team Member. b) All CVs should be consolidated into a single PDF and submitted as a separate file. c) CVs should include a LinkedIn profile for the Team Member, if available.	

5.3 Stage 3 – Consensus Review & Ranking

Once proposals have been scored by the evaluators individually a final consensus review will be conducted.

Stage 3: Consensus Ranking	100
For Proponents that satisfy all mandatory and minimum scoring threshold requirements, their technical & financial scores will be evaluated by the review committee. A ranking of all Proponents will be generated based on their respective total scores. Proponents will then be notified of their status in the procurement process. See section 6. Notifications & Debrief Meetings for more details.	100

6. Notification & Debrief Meetings

6.1 Status Notifications

All Proponents will be notified by email, addressed to the main contact listed in Appendix A, on the status of their proposal once the evaluation period is completed. *Please note that notification dates provided for the priority groups are subject to change dependent on the volume of proposals received.

6.2 Debrief Meeting Requests

Unsuccessful Proponents can request a debrief meeting via email to corporateservices@cagbc.org within **30** days of notification.

7. Vendors of Record

Successful Proponents will be retained as Vendors of Record (VORs) using CAGBC's Master Service Agreement (MSA) to establish a Standing Offer for services. MSAs will cover the Terms & Conditions for the Standing Offer, including but not exclusive to compliance requirements for insurance, confidentiality, intellectual property, and conflicts of interest.

7.1 Duration

Standing Offers are typically for 3-year terms, at fixed rates, with an option to renew/renegeotiate for an additional 2-year term after the first term has expired.

7.2 Call-Up Procedure

CAGBC will issue a Call-Up Requisition (CUR) to appropriate VORs for specific projects that will outline details and scope of work. VORs are then asked to estimate time and cost at the agreed upon rates for the project. CURs may be issued to multiple VORs for estimates, or may be issued to a single VOR, depending on project deliverables and matching expertise. It will be at the discretion of the project manager to select VOR(s) for any given project based on completed CURs.

7.2 No Commitment Clause

- a) The issuance of this Request for Standing Offer (RFSO) and the inclusion of any Vendor of Record (VOR) on a standing offer list does not constitute a commitment by CAGBC to procure any goods or services from the VOR.
 - b) The inclusion of a VOR on the standing offer list is not a guarantee of any specific volume of work, dollar value, or any level of engagement.
 - c) CAGBC reserves the right, at its sole discretion, to obtain the same or similar goods or services from other sources as it may deem appropriate.
 - d) No exclusivity is conferred by this RFSO or any resulting Standing Offer Agreement.
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8. Appendices

- **Appendix A:** Submission Form as PDF
 - **Appendix B:** Financial Proposal as Excel
 - **Appendix C:** Curriculum Vitae of Team Member(s) as PDF
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9. Definitions

- **CAGBC:** *Canada Green Building Council.*
 - **Proponent:** *A person or entity submitting a proposal.*
 - **Standing Offer:** *An arrangement where a vendor agrees to provide goods or services as requested at fixed rates.*
 - **Vendor of Record (VOR):** *a pre-qualified supplier or vendor who has met specific criteria and has been approved to offer goods or services to a particular organization or client. This designation allows the organization to streamline the procurement process by referring to a list of pre-approved vendors rather than going through a new selection process each time.*
 - **Master Service Agreement (MSA):** *A contract developed by CAGBC and signed off by successful Proponents.*
 - **Call Up Requisition (CUR):** *A CUR is used by CAGBC to outline the details and scope of work for a specific project.*
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CAGBC is excited to partner with consultants that will help us achieve our goal goals across Canada. We look forward to receiving your proposal.