

**Zero Emissions Innovation Centre
Request for Proposal
Decarbonization Planning Software for Multi-unit Residential Buildings**

1 Introduction

The Metro Vancouver Zero Emissions Innovation Fund (MVZEIF, dba Zero Emission Innovation Centre or ZEIC) is inviting proposals from qualified software providers to procure a decarbonization planning software and co-develop a report for the Strata Program stream of the BC Retrofit Accelerator, a program providing education, capacity building and advisory services on planning for low-carbon retrofits.

The successful proponent will work collaboratively with the program team consisting of the Program Manager and Technical Manager, with input from external advisors to adapt their existing decarbonization planning software to meet the program's requirements and co-develop a report for strata's.

Details of ZEIC's objectives and requirements are set out in Section 3 – Scope of Work. ZEIC invites proponents to submit proposals in the form prescribed in Section 4 – Form of Proposal. ZEIC recognizes that existing software tools may not provide all the features as described in the scope of work. The proponent should detail how they would work together with the ZEIC Team over time to incorporate new features where required. ZEIC will also consider innovative or novel approaches to their objectives and requirements.

Background

The [Zero Emissions Innovation Centre](#) (ZEIC) is a non-profit charitable organization established in 2021 as part of the [Low Carbon Cities Canada](#) (LC3) initiative. Our mandate is to catalyze, accelerate and scale climate action and innovation across BC related to green buildings, renewable energy, and transportation through a combination of impact investing, granting, partnerships, research and capacity building. The ZEIC family of programs includes the [Zero Emissions Building Exchange](#) (ZEBx), [Building 2 Electrification Coalition](#) (B2E) and [Carbon Leadership Forum BC](#) (CLFBC) and our newest program stream: the BC Retrofit Accelerator.

The BC Retrofit Accelerator (BCRA) was established in 2023 to accelerate the transition to net-zero emissions for existing buildings, particularly in underserved sectors. Starting with seed funding from Metro Vancouver's Sustainable Innovation Fund, ZEIC has secured federal and philanthropic funding to support initiatives under the BCRA including a provincial Strata program based on the original Metro Vancouver Strata Energy Advisor pilot. In collaboration with the Condominium Home Owners Association (CHOA), ZEIC has evolved the pilot program to prioritize low-carbon retrofits and support a zero-over-time decarbonization strategy that aligns with major capital renewals. The goal is to take a building-as-a-system approach and bundle electrification, energy efficiency, demand management, and distributed energy (renewables and battery storage) opportunities into a series of retrofit projects. This approach considers the order of projects and where possible, plans for future projects, particularly where there is an opportunity to reduce cost or complexity.

The goal is to work with approximately 225 multi-unit residential strata-owned buildings between Fall 2024 and Spring 2027; this may increase if additional funding is secured. The ZEIC Team will provide the support services to strata owners and are seeking a proponent to provide the decarbonization planning software.

2 Information and Instructions

2.1 The RFP

- 2.1.1 Except where expressly stated otherwise: (i) no part of the RFP consists of an offer by ZEIC to enter into any contractual relationship; and (ii) no part of the RFP is legally binding on ZEIC
- 2.1.2 ZEIC is interested in selecting an entity having submitted a Proposal (a “Proponent”) with the capability and experience to efficiently and cost-effectively meet the objectives and requirements described in the RFP. ZEIC currently expects to select such a Proponent and then enter into negotiations with that Proponent, which will conclude in the execution of a contract between the Proponent and ZEIC (“Agreement”). However, ZEIC may: (i) decline to select any Proponent; (ii) decline to enter into any Agreement; (iii) select multiple Proponents for negotiation; or (iv) enter into one or more agreements respecting the subject matter of the RFP with one or more Proponents or other entities at any time. ZEIC may also terminate the RFP at any time.
- 2.1.3 ZEIC currently intends that Proposals will be evaluated by the Project Team and the project steering committee comprised of representatives of ZEIC and key partners or funders (the “Project Steering Committee”) in relation to their overall value, which will be assessed in ZEIC and the Project Steering Committee’s sole and absolute discretion.
- 2.1.4 No bid security is required from Proponents in connection with the submission of Proposals because no Proposal will be deemed to be an irrevocable or otherwise binding legal offer by a Proponent to ZEIC.
- 2.1.5 The execution of an Agreement may be contingent on funding being approved, and the relevant Proposal being approved, by ZEIC’s Board of Directors.
- 2.1.6 The RFP consists of four parts, plus appendices:

1	INTRODUCTION: this is intended to provide context for the RFP and outline MVZEIF’s objectives.
2	INFORMATION AND INSTRUCTIONS: This part is intended to serve as a guide to the RFP process for Proponents.
3	SCOPE OF WORK: This part describes the subject matter of the RFP, in respect of which MVZEIF invites Proposals.
4	FORM OF PROPOSAL: This is the form in which the Proposal should be submitted.

Key Dates

- 2.1.7 Potential Proponents should note the following key dates:

Event	Time and Date
Intention to Bid	Friday May 24, 2024 at 4:00 pm PST
Deadline for Enquiries	Friday May 31, 2024 at 4:00 pm PST
Closing Time	Friday June 7, 2024 at 4:00 pm PST

- 2.1.8 All references to time in the RFP are references to Pacific Standard Time.

2.2 Contact Person

2.2.1 All enquiries regarding the RFP must be addressed to:

Stephan Baeuml
BC Retrofit Accelerator – Technical Manager
Zero Emissions Innovation Centre
BCRA@zeic.ca

2.2.2 All enquiries must be made in writing and are to be directed only to the above contact person. In-person or telephone enquiries are not permitted. Any communication from potential Proponents to ZEIC staff other than the contact person regarding the content of this RFP may lead to disqualification of the Proponent from this RFP process, at ZEIC's sole discretion.

2.3 Intention to Bid

Proponents should indicate their intention to bid by emailing BCRA@zeic.ca with the Proponents name and primary contact persons name and email. This will ensure you receive any addenda in a timely manner.

2.4 Submission of Proposals

2.4.1 Proponents should submit their Proposals on or before the time and date specified in the bottom row of the table in Section 2.2 above (the "Closing Time").

2.4.2 Each Proponent should submit its Proposal by email in accordance with the following:

- Subject of the file to be: Vendor Name_Part of Submission_ZEIC Decarb RFP,
- Document format for submissions, all in PDF format:
 - Proposal including cover letter
 - Financial submission (separated from proposal)
 - Supporting documents
- Zip the files to reduce the size or email separately if needed.
- Only emailed submissions will be accepted. Send your submissions to BCRA@zeic.ca
- Submitting the files via Drop box, FTP, or similar programs, is not acceptable.

2.4.3 To be considered by ZEIC, a Proposal must be submitted in the form set out in Section 4 - Form of Proposal, and executed by a representative with sufficient authority.

2.4.4 Amendments to a Proposal may be submitted via the same methods, at any time prior to the Closing Time.

2.4.5 Proposals are revocable and may be withdrawn at any time before or after the Closing Time.

2.4.6 All costs associated with the preparation and submission of a Proposal, including any costs incurred by a Proponent after the Closing Time, will be borne solely by the Proponent.

2.4.7 Unnecessarily elaborate Proposals are discouraged. Proposals should be limited to the items specified in Section 3 - Scope of Work of the RFP.

2.4.8 ZEIC is willing to consider any Proposal from two or more Proponents that wish to form a consortium for the purpose of responding to the RFP, provided that they disclose the names of all members of the consortium, identify a project lead, and all members complete and sign the first page of the Form of Proposal. Nonetheless, ZEIC and the Project Steering Committee have a strong preference for Proposals submitted by a single Proponent.

2.4.9 Proposals that are submitted after the Closing Time or that otherwise do not comply in full with the terms hereof will not be considered by ZEIC.

2.5 Changes to the RFP and Further Information

2.5.1 ZEIC may amend the RFP or add clarifications prior to the deadline for enquiries.

2.5.2 It is the sole responsibility of Proponents to indicate their intention to bid in order to receive amendments, addenda, and questions and answers in relation to the RFP.

2.5.3 Proponents must not rely on any information purported to be given on behalf of ZEIC that contradicts the RFP, as amended or supplemented in accordance with the above.

2.6 Proposed Term of Engagement

2.6.1 The term of any Agreement will expire on completion of all services in accordance therewith, which ZEIC and the Project Steering Committee expects will be approximately three (3) years after commencement of the services. ZEIC, in its discretion, may choose to extend the agreement with the proponent and/or assign any extensions of the term to partner organizations.

2.7 Pricing

2.7.1 All prices quoted in Proposals are to be exclusive of applicable sales taxes, with applicable PST or GST clearly indicated as a separate line item.

2.7.2 Prices must be quoted in Canadian currency and fixed prices must be quoted for the full term of the Proponent's proposed agreement.

2.8 Evaluation of Proposals

2.8.1 ZEIC and the Project Steering Committee currently intends that Proposals submitted to it in accordance with the RFP will be evaluated by ZEIC and Project Steering Committee representatives, using quantitative and qualitative tools and assessments, as appropriate, to determine which Proposal or Proposals offer the overall best value.

Weighting	Evaluation Criteria
15%	Proposed Team and Relevant Experience
30%	Software Features
15%	Workplan and Schedule
10%	Collaboration and Values Alignment
30%	Pricing
100	TOTAL SCORE

- 2.8.2 ZEIC may, at any time prior to signing an Agreement, discuss or negotiate changes to the scope of the RFP with any one or more of the Proponents without having any duty or obligation to advise the other Proponents or to allow the other Proponents to vary their Proposals as a result of such discussions or negotiations.
- 2.8.3 ZEIC and the Project Steering Committee may elect to short-list Proponents and evaluate Proposals in stages. Short-listed Proponents may be asked to provide additional information or details for clarification, including by attending interviews, making presentations, supplying samples, performing demonstrations, furnishing technical data or proposing amendments to the Form of Agreement. ZEIC will be at liberty to negotiate in parallel with one or more short-listed Proponents, or in sequence, or in any combination, and may at any time terminate any or all negotiations.
- 2.8.4 ZEIC and the Project Steering Committee may also require that any proposed subcontractors undergo evaluation by ZEIC.
- 2.8.5 Notwithstanding any other provision in the RFP, ZEIC and the Project Steering Committee have in their sole discretion, the unfettered right to: (a) accept any Proposal; (b) reject any Proposal; (c) reject all Proposals; (d) accept a Proposal which is not the lowest-price proposal; (e) accept a Proposal that deviates from the requirements or the conditions specified in the RFP; (f) reject a Proposal even if it is the only Proposal received by ZEIC; (g) accept all or any part of a Proposal; (h) split the scope of work between one or more Proponents; and (i) enter into one or more agreements respecting the subject matter of the RFP with any entity or entities at any time. Without limiting the foregoing, ZEIC may reject any Proposal by a Proponent that has a conflict of interest, has engaged in collusion with another Proponent or has otherwise attempted to influence the outcome of the RFP other than through the submission of its Proposal.

2.9 Certain Applicable Legislation

- 2.9.1 Proponents should note that the ZEIC, for the purpose of this project, is subject to the Freedom of Information and Protection of Privacy Act (British Columbia), which imposes significant obligations on the ZEIC's consultants or contractors to protect all personal information acquired from the ZEIC in the course of providing any service to the ZEIC.
- 2.9.2 Proponents should note that the Income Tax Act (Canada) requires that certain payments to non-residents be subject to tax withholding. Proponents are responsible for informing themselves regarding the requirements of the Income Tax Act (Canada), including the requirements to qualify for any available exemptions from withholding.

2.10 Legal Terms and Conditions

- 2.10.1 The legal obligations of a Proponent that will arise upon the submission of its Proposal are stated in this Appendix 2 to the Form of Proposal. Except where expressly stated in these Legal Terms and Conditions: (i) no part of the RFP consists of an offer by ZEIC to enter into any contractual relationship; and (ii) no part of the RFP is legally binding on ZEIC.

3 – Scope of Work

The scope of work stated in this Section 3 (collectively, the “Scope of work”) is current as of the date hereof, but may change or be refined in the course of the evaluation of Proposals or otherwise. If this occurs, amendments will be issued to Proponents that have notified ZEIC of their interest in this RFP.

3.1 Purpose

The goal of this project is to work with a qualified provider to refine an existing software auditing / decarbonization planning tool that building owners, particularly strata owners, can use to identify decarbonization opportunities in their buildings and align them with their capital planning. The software should :

- Provides a high-level analysis with sufficient information and accuracy that gives strata councils and strata lot owners confidence in pursuing further investigation into decarbonization opportunities or proceeding with decarbonization projects
- Recommends a series of projects, aligned with major building renewals, that will result in their building achieving zero emissions over time,
- Provides more detailed information on an imminent renewal project that considers: electrification, energy efficiency, demand management and distributed energy (renewable and battery-storage) opportunities in that order of priority, including comparing a like-for-like replacement with a low-carbon option.
- Provides an estimate of current and future electrical capacity and a likelihood of requiring additional electrical capacity to achieve near term and long-term decarbonization goals.

This is intended as an opportunity assessment, not to meet the requirements for an electrical planning report or depreciation report. Our intention is that building documentation, if available, will be collected and shared with consultants who can use it as a starting point for their own projects with a high degree of confidence and ideally avoid the need to duplicate building documentation

3.2 Context for the Strata Retrofit Program

The Province of British Columbia has set a target of net-zero emission buildings by 2050, and many local governments have adopted this target with interim targets in 2030. While programs and rebates have been made available to single-family home-owners and commercial building owners, there have been few programs to date working to support decarbonization in the residential strata sector.

Residential strata buildings make up make up 680,000 households in BC, housing over 1.5 million people representing 24% of our residential housing stock. Strata’s have complex decision-making structures requiring 50-75% owner approval votes to proceed with any capital investments. They are governed by volunteer elected council’s comprised of owners; many of which have no background or knowledge of building management, energy efficiency, or capital planning. Property Managers hired to support Strata Councils are time-constrained and have no incentive to engage in complex retrofit or decarbonization projects or their planning. Most retrofit projects are only approved at the time of system failure, at which point the priority is a like-for-like replacement to resume basic building services.

The greatest opportunity to move strata buildings towards decarbonization objectives is to provide trusted third-party advice and support to identify and navigate deep energy retrofits while helping the larger ownership group to understand the array of energy and non-energy benefits. ZEIC's strata program aims to provide up-front project planning supports to help strata owners to better prepare for major building system renewals and incorporate decarbonization and other non-energy benefits into their decision-making.

Developing a high-level decarbonization plan is the first step in a strata understanding the opportunities and benefits of decarbonizing their building. By providing them with a simple, clearly communicated opportunity assessment that lays out the options for their buildings and helps them to make an informed decision about pursuing an upgrade of their building rather than a like-for-like replacement. Most decarbonization planning tools require significant knowledge of buildings and produce technical reports that are difficult for a layman to interpret. ZEIC is seeking a Proponent to work with our project team to customize an existing decarbonization planning tool, that can be used by our program staff as a starting point in the strata decarbonization program as they support strata's to navigate decarbonization projects.

3.3 Description of Deliverables

3.3.1 Data Collection and Populating the Software Tool

ZEIC program staff will be responsible for all coordination with building representatives, including setting up energy star portfolio manager accounts (ESPM) for each building, data collection and populating the software tool. It is expected that the software will be able to:

- Import up to three years of energy data (including interval data where available) preferably from ESPM, but at a minimum from BC-based utilities including, but not limited to, electricity, natural gas, district heating.
- Provide an offline building data collection tool and/or import data from a standardized form including but not limited to:
 - Basic building enclosure information: opaque wall to window ratio, window type, frame type, presence of patio doors, parkade etc.
 - Heating, cooling, ventilation and hot water equipment documentation including year of install and equipment specifications, make and model etc
 - Electrical capacity (in suite and building including transformer) and details of electric vehicle charging infrastructure (if applicable)
 - General condition notes including hazmat, fire safety etc.

3.3.2 Generate High-Level Decarbonization Plan / Opportunity Assessment

The decarbonization plan generated by the software tool should include the following features. The term "features" refers to information that will be displayed as part of the report and/or analytics tools. ZEIC recognizes that a given software tool may not offer all the features we are requesting. Where a feature is not currently part of the software tool, ZEIC may be interested in working with the software provider to develop that feature. A sample decarbonization plan outline is included in Appendix 1, as a starting point.

Report Features List:

- Confirm basic building information
 - Building name, strata corporation number, address, climate zone, type, floors, units
 - Simple summary of major building systems
 - Statement of building owner priorities (cost, cooling, safety, air quality, GHG emissions, regulatory compliance etc.)
- Calculate key metrics: (required at launch)
 - Energy Use Intensity (EUI) in GJ/m² per year
 - Greenhouse Gas Intensity (GHGi) in kg CO₂_e/m² per year
 - Heat Energy Intensity (HEI) in GJ/m² per year
 - Total Annual Energy Use in GJ per year
 - Annual Utility Cost in \$ per year by energy source
 - Annual GHG Emissions in Tonnes of CO₂_e per year
- Energy & GHG Analysis
 - End use breakdown (energy, GHG, cost)
 - Annual consumption profile (by source)
 - Benchmarking annual GHG emissions against comparable average and regulatory targets (where applicable)
- Path to Net Zero Emissions by 2050 aligned with capital renewals (required at launch)
 - Recommended bundles of ERM's, including electrification, energy efficiency, demand management and renewable ready opportunities to meet net zero building emissions by 2050
 - Where more than one solution exists for a major capital renewal, state the alternative and why the recommended ERM was selected.
 - Recommended sequencing of ERM's for best overall building performance
- Electrical Capacity Analysis
 - Simple summary of electrical capacity including transformer, in-suite panel
 - Current Demand Load (kW)
 - Future Estimated Demand Load (kW): total and by system including EV charging infrastructure where applicable
 - % likelihood of requiring an electrical capacity upgrade to achieve a net-zero emissions building
 - Recommended sequencing of ERM's to mitigate increased electrical capacity requirements including both energy efficiency and demand management strategies and estimated demand reduction potential.
- ERM Analysis – Priority Capital Renewal
 - Present three scenario's
 - Scenario 1: Business as usual or minimum regulatory requirement
 - Scenario 2: Path to net zero, optimized for building owner priorities
 - Scenario 3: Path to net zero, optimized for lowest emissions
 - Ability to optimize recommendations based on building owner priorities
 - Disclaimer statement regarding unknown design limitations (siting, access to electrical panel, code triggers).
 - Scenario's should compare:
 - Energy Use and GHG impacts
 - Non-energy benefits
 - Statement of assumptions in scenario analysis including confidence

- Financial Analysis
 - Present three scenario's
 - Scenario 1: Business as usual or minimum regulatory requirement
 - Scenario 2: Path to net zero, optimized for building owner priorities
 - Scenario 3: Path to net zero, optimized for lowest emissions
 - Scenario's should present
 - Total Capital Cost
 - Incremental Cost
 - Utility Cost
 - Maintenance Cost
 - Cost Avoidance (carbon tax and/or regulatory compliance)
 - Available Rebates
 - Lifecycle return on investment
 - Include links to rebates and brief descriptions (where applicable)
 - Include links to financing tools and brief descriptions (where applicable)
- Summary Recommendations

3.3.3 Quality Control

The software provider should include a quality control mechanism for reports and recommendations as a separate line item in their budget. ZEIC reserves the right to contract a third-party qualified building decarbonization analyst/engineer to review reports and recommendations for accuracy.

3.3.4 Customization

ZEIC anticipates customization may be required to meet overall purpose of this project. This may be negotiated directly with the successful provider, but is anticipated to include:

- Customize assumptions and analysis to conform with emerging standards and best practices in BC.
- Customize the reporting format for target audiences.
- Customize the building documentation form / tool such that they can be completed offline by ZEIC staff.
- Ability to export data in customized format such that ZEIC can undertake reporting obligations to funders and undertake research and analysis related to the BC Retrofit Accelerator objectives.
- Ability to export building documentation for the building owner's to share data with consultants or contractors to complete additional analysis w/out duplicating building documentation.
- Incorporating rebate or financing opportunities into the financial analysis as they become available.

As outlined in the budget section, please clearly indicate what is already included in the software package and which features may need to be developed or customized along with a project budget.

3.3.5 Training

The SaaS provider will provide training for ZEIC staff to use the software with provisions for an ongoing troubleshooting or support mechanism.

3.5 Terms and Conditions

3.5.1 Hosting and Data Security

Data must be stored in Canada and meet BC Freedom of Information and Protection of Privacy Requirements. Building information may never be shared in an identifiable format without express permission by an authorized building contact. If building data will be used in an anonymized form to improve software or services it must be disclosed.

3.5.2 Account Access and Storage

ZEIC staff will be the sole users of the software for the purposes of this scope of work and the program. ZEIC staff may screenshare or otherwise engage building owners / representatives in refining the decarbonization plan to meet their objectives. Where annual or other subscription billing is used, ZEIC may choose to deactivate buildings to mitigate costs. Building data should be archived such that ZEIC may reactivate the account at a future date. At this time there is no provisions for building owners representatives to have direct access to the software. Should the building owner / representative wish to keep the account active after their participation in the program has been terminated, the software provider may offer that for a fee (pre-disclosed).

3.5.3 Analysis Transparency

The successful Proponent may be asked to clarify assumptions in their analysis such that ZEIC may confirm it complies with current and/or emerging best practices. This may include assumptions or sourcing of cost estimates or benchmarking comparison data as an example.

Where the software provider and ZEIC co-develop a new feature that includes a standardized approach for analysis, ZEIC reserves the right to share and promote that standardized approach amongst their network as part of establishing decarbonization best practices.

3.5.4 Insurance

The successful Proponent may be required to provide the following confirmation of insurance as relevant to the scope of work.

- A. Certificate of Existing Insurance
 - Commercial General Liability*
 - Professional Liability*
- B. Proof of WorkSafeBC Registration

3.7 Schedule

The following schedule outlines key milestones for this RFP. Specific details may be negotiated with the ZEIC team. Development of additional features may be staged over time. This timeline is based on an early June award.

Phase	Timeline	Deliverable
1 Core Development	June – September 2024	<ul style="list-style-type: none">• Utility data import methodology• Building data collection tool• All core features• Report format• Export functionalities
2 Training and Testing	August – September 2024	<ul style="list-style-type: none">• Training for key staff• Trial of 3-5 buildings
3 Program Launch and delivery	September 20, 2024 thru March 31, 2027	<ul style="list-style-type: none">• Reports for 225 buildings, roughly• Year 1: 65• Year 2: 80• Year 3: 80
4 Feature Development	TBD	<ul style="list-style-type: none">• New features as negotiated
5 Refinement	Annual / Ongoing	<ul style="list-style-type: none">• Annual or semi-annual refinements

Appendix 1

Sample High-Level Decarbonization Report Outline

PAGE 1 | EXECUTIVE SUMMARY

- Narrative description of the Strata priorities and needs, key decision-making factors.
- Narrative summary of recommended next steps.
- Quick statistics / visuals including:
 - Energy Use Intensity (EUI) versus benchmark
 - Greenhouse Gas Intensity (GHGI) versus benchmark

PAGE 2 | BASIC BUILDING INFO

- Basic Information on the building, including key systems information
- Description of priority project (retrofit) and options explored

PAGE 3 | ENERGY & EMISSIONS ANALYSIS

- Quick statistics
 - Total Annual Energy Use (electricity, natural gas & other)
 - Total Annual GHG Emissions
 - Total Annual Utility Cost (electricity, natural gas & other)
 - Energy Use Intensity (EUI)
 - Greenhouse Gas Intensity (GHGI)
 - Heat Energy Limit (HEL)
- End use breakdown: Energy & GHG & Utility Cost
- Energy Use Intensity – Benchmarked
- GHG Intensity – Benchmarked (City of Vancouver targets over time for reference where appropriate)

PAGE 4 | ELECTRICAL CAPACITY ANALYSIS

- Electrical Capacity Documentation
- Total Building Demand Load (kW)
- Future Demand (by project if possible, including demand management and energy efficiency opportunities); likelihood of requiring electrical capacity upgrade
- Narrative of recommended staging to avoid electrical services upgrade

PAGE 5 | PATH TO NET ZERO

- Project bundles, aligned with major capital renewals, to meet net zero by 2050, reference alternatives where appropriate.
- Restate how priorities are reflected in the path to net zero, especially for the 1st (priority) project.
- Indicate if there is recommended sequencing... or bundling to improve building performance outcomes or cost avoidance reasons.

PAGE 6 | ERM ANALYSIS – PRIORITY CAPITAL RENEWAL

- Business case energy comparison – like for required (HEES or other) and low-carbon option
 - Breakdown by measure
- Energy impacts
- Non-energy benefits

PAGE 7 | FINANCIALS

- Business case cost comparison – BAU or like for required (HEES or other) and low-carbon option
- Total cost over time – lifecycle payback for equipment
- Cost avoidance
 - Carbon Tax
 - CoV non-compliance with GHG limits (where applicable)
- Rebates
- Financing
- Narrative around cost estimates to manage expectations and clarify what is included and what additional costs may be uncovered in the design process.

PAGE 8 | RECOMMENDATIONS & NEXT STEPS

- Clear recommendation
- Next steps (program process & approvals & supports)

APPENDICES | TO BE PREPARED BY ZEIC

About:

- ZEIC, BCRA and the Program including supporting organizations

Assumptions / Analysis Explainer

- Provided by SaaS provider
- Clarify assumptions in calculations + disclaimers

Technology Explainer

- Low-carbon technology explainer(s) – custom to recommendation

Policy Explainer

- Provincial net-zero targets
- City of Vancouver reporting requirements
- Provincial Highest Heating Efficiency Standard (HEES) when available

4 Form of Proposal

Concise proposals are encouraged. Please prepare your proposal in the following format to assist with evaluation. Proposals should be submitted as xxx individual files all in .PDF format:

1. Proposal including Cover Letter
2. Financial Submission
3. Supporting Documents

4.1 Form of Proposal

<p>1. Proponent Information</p> <p>1.1. Organization <i>Please describe your organization, including parent companies or affiliations where relevant.</i></p> <p>1.2. Team <i>Please include key team members, roles, and experience with similar projects.</i></p>
<p>2. Experience with similar projects (maximum 2) <i>Please describe two (2) similar projects and indicate how you worked with the client to meet their objectives.</i></p>
<p>3. Software Features <i>Please describe how your software meets the following features. If a feature is currently not part of your Software, please indicate so, and provide your approach to developing that feature.</i></p> <p>Core Requirements</p> <p>3.1. User Interface and Permissions</p> <p>3.2. Benchmarking & Key Metrics</p> <p>3.3. Emission Reduction Measure (ERM) prioritization and bundling</p> <p>3.4. Electrical Capacity Analysis</p> <p>3.5. Building as a System (accounting for interactive effects)</p> <p>3.6. Decarbonization Over Time (Capital Planning)</p> <p>3.7. Financial Analysis</p> <p>3.8. Emission Reduction Measure (ERM) Costing</p> <p>3.9. Integration</p>
<p>4. Terms & Conditions <i>Please describe how your organization addresses or plans to address the following items.</i></p> <p>4.1. Hosting and Data Security</p> <p>4.2. Account Access and Storage</p> <p>4.3. Analysis Transparency</p> <p>4.4. Insurance</p>
<p>5. Workplan, including major milestones <i>Please include a workplan indicating major milestones.</i></p>
<p>6. Collaboration & Values Alignment <i>Please describe how your organization addresses or plans to address the following items.</i></p> <p>6.1. Quality Control</p> <p>6.2. Collaboration</p> <p>6.3. Customization</p> <p>6.4. Sustainability</p> <p>6.5. Justice, Equity, Diversity & Inclusion</p> <p>6.6. Value Add</p>

4.2 Financial Submission

The financial submission should identify the “Net Total Cost” to provide the work or services outlined in the scope of work. For services, you should also include a breakdown of the hourly charge out rates of key personnel and support staff and the work they are performing including materials costs, expenses or any other charges. Applicable taxes should be indicated separately. The financial submission should be in Canadian dollars.

Where per unit or subscription fees apply, these shall be expressed as a fixed fee not a range. Where volume discounts may apply, they should be clearly indicated. Ranges will not be accepted. If a range of costs is submitted, we will assume the highest cost for evaluation purposes.

Pricing will be firm for the initial term of the contract (to March 31, 2027). Price increases may be considered for renewal terms written notice of increase must be served ninety (90) days prior to the expiration of the Term.

The activities or tasks listed in the Scope of Work are minimum requirements to be undertaken. Proponents may also provide separate pricing on additional feature or activities they feel would benefit ZEIC in meeting their program objectives.

ZEIC’s funding is on an annual basis with March 31 as the year end. The financial submission should identify the annual cost for the software platform per building or based on an annual fee. Building profiles are anticipated to remain active for 12-18 months. Annual per building costing, where appropriate, can be estimated at:

Year 1	65 Buildings
Year 2	80 Buildings
Year 3	80 Buildings

New software features or other customizations should be costed based on hours and rates for each item, including value add-items. Where core features may be required for development in year 1, please allocate to year 1 (June 2024 - March 31, 2025). Any additional scope of work negotiated will be at the rates provided in this RFP submission.

4.3 Supporting Documents

Supporting documents should include:

- Resumes for Key Team Members
- Sample Report

Appendix 2

APPLICATION OF THESE LEGAL TERMS AND CONDITIONS

These legal terms and conditions set out the ZEIC's and the Proponent's legal rights and obligations only with respect to the RFP proposal process and any evaluation, selection, negotiation, or other related process. In no event will the legal terms and conditions of the Form of Proposal apply to, or have the effect of supplementing, any Contract formed between the ZEIC and the Proponent, or otherwise apply as between the Proponent and the ZEIC following the signing of any such Contract.

DEFINITIONS

In this RFP, the following terms have the following meanings:

- a) "ZEIC" means the Metro Vancouver Zero Emissions Innovation Fund (MVZEIF) operating as Zero Emissions Innovation Centre (ZEIC), a registered non-profit charitable organization in Canada.
- b) "Contract" means a legal agreement, if any, entered into between the ZEIC and the Proponent following and as a result of the Proponent's selection by the ZEIC in the ZEIC's RFP process.
- c) "Losses" means, in respect of any matter, all direct or indirect, as well as consequential: claims, demands, proceedings, losses, damages, liabilities, deficiencies, costs and expenses (including without limitation all legal and other professional fees and disbursements, interest, penalties and amounts paid in settlement whether from a third person or otherwise).
- d) "Proponent" means the legal entity which has signed the Proposal Form, and "proponent" means any proponent responding to the RFP, excluding or including the Proponent, as the context requires.
- e) "Proposal" means the package of documents consisting of the Proposal Form, the Proponent's proposal submitted under cover of the Proposal Form, and all schedules, appendices and accompanying documents, and "proposal" means any proposal submitted by any proponent, excluding or including the Proponent, as the context requires.
- f) "Proposal Form" means that Section 4 of the RFP, completed and executed by the Proponent, to which these definitions apply.
- g) "RFP" means the document issued by the ZEIC as Request for Proposals, as amended from time to time and including all addenda.

NO LEGAL OBLIGATION ASSUMED BY ZEIC

Despite any other term of the RFP or the Proposal Form, ZEIC assumes no legal duty or obligation to the Proponent or to any proposed subcontractor in respect of the RFP, its subject matter or the Proposal unless and until ZEIC enters into a Contract, which ZEIC may decline to do in the ZEIC's sole discretion.

NO DUTY OF CARE OR FAIRNESS TO THE PROPONENT

ZEIC is a charitable non-profit required by law to act in the public interest. In no event, however, does ZEIC owe to the Proponent or to any of the Proponent's proposed subcontractors (as opposed to the public) any contract or tort law duty of care, fairness, impartiality or procedural fairness in the RFP process, or any contract or tort law duty to preserve the integrity of the RFP process.