



Building Performance Team Meeting - Agenda

Wednesday, November 9th, 2011 1:30 – 3:30p.m.

Center for Health and Safety Innovation - 5110 Creebank Road, Mississauga – Meeting Rm. B

Conference Line: 416-343-4997 Conference ID: 5346694

1. New PPG Website Eco-Efficiency Tools Demo
2. Partners in Project Green Carbon Benchmarking Tool
3. Energy Benchmarking Workshop Series
4. Energy Efficient Technology Series
5. Green Technology Webinar Series
6. Eco-Efficiency Consultant Roster Scorecard Criteria
7. Energy Leaders Consortium RFP Review
8. New Business

Item 1

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: PARTNERS IN PROJECT GREEN WEBSITE ECO-EFFICIENCY TOOLS DEMO

KEY ISSUE

To provide an overview of the new Partners in Project Green website and the eco-efficiency tools available to help companies identify conservation opportunities and connect to solution providers.

BACKGROUND

Over the past three years TRCA staff has collected a lot data on companies around Toronto Pearson and on the sustainability opportunities available to their operations. In effort to help other companies learn from these solutions, the Partners in Project Green website has been redesigned to facilitate the identification of sustainability solutions, the connection to solutions and the management of their implementation.

REVAMPED DATA STRUCTURE AND USER APPROACH

The new website features a number of databases including:

1. Business Data – tombstone and basic information on local companies, along with product info, certifications and resource consumption.
2. User Data – contact information for users.
3. Case Study Directory – case studies on local sustainability leaders.
4. Green Vendor Directory – information on a company's green products and / or services.
5. Program Directory – collection of programs and incentives available to companies.
6. Project Profiles – data on Partners in Project Green programs accessed.
7. Client Relationship Manager – a CRM system attached to each company to manage relationships.

However, the overall database is linked by the Sustainability Opportunities database, which helps guide users from identifying common sustainability initiatives, to connecting with resources (such as Partners in Project Green programs, external vendors, consultants, and incentive programs), and finally to tracking and recognizing their successes.

Now local companies can add these opportunities to their Sustainability Opportunities profile, which will then allow them to identify specific programs and vendors who can help them implement the opportunities, and then report out on the results at the end of the process.

As part of this report, TRCA staff will provide a live demonstration of the site for team members.

NEXT STEPS

The website has already been soft-launched and input from the Building Performance Team on usability would be appreciated before the official launch in December.

Report prepared by: Chris Rickett, extension 5316

For more information contact: Chris Rickett, extension 5316

Date: November 4, 2011

Item 2

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: PARTNERS IN PROJECT GREEN CARBON BENCHMARKING TOOL

KEY ISSUE

Update on the development of the online Partners in Project Green Carbon Benchmarking Tool.

BACKGROUND

In partnership with Zerofootprint, TRCA staff has been developing the Partners in Project Green Carbon Benchmarking Tool. The purpose of the tool is to allow companies the opportunity to enter their energy data and anonymously compare their carbon footprint with peers within their sector based on a number of indicators, including square footage and employee numbers.

The goal of the tool is raise awareness about energy conservation and carbon emissions, while connecting companies to resources that can help them reduce their carbon footprint and drive cost reductions. By utilizing peer and sector-based benchmarking, the goal is to use the sector's best performers to encourage the sector's laggards to act and implement solutions that not only make them more competitive, but also reduce carbon emissions.

TOOL DEVELOPMENT

The tool is being developed as part of a collaboration with Zerofootprint that will see the tool developed at no-cost to TRCA and be provided at no-cost for Partners in Project Green partners. The collaboration was built upon TRCA sharing some of its data sets to help to develop the tool, while Zerofootprint shared their expertise in developing carbon management and benchmarking software.

However, if a business is interested in more detailed report on their carbon footprint or are interested in completing a Carbon Disclosure Report, they will be referred to Zerofootprint through the Partners in Project Green website to complete a fee-for-service transaction. A commercial agreement between Zerofootprint and TRCA will ensure that a business development fee will be shared with TRCA and be used to fund future Partners in Project Green programming.

TOOL LAUNCH

The proposed tool will soft launch at the end of November and a select number of companies will be introduced to the tool. The purpose of this soft launch will be to get some additional energy data into the tool from select sectors, as well gather user feedback on the tool in order to make any changes that will make the process easier for Partners in Project Green clients.

The public launch will take place in January 2012 and will involve a broad marketing plan that will introduce the tool to businesses throughout the zone and beyond through Partners in Project Green's newsletter and website, but also through targeted relationships with sector

associations (i.e. hospitality, logistics / warehousing, etc.) that will focus on benchmarking entire sectors.

NEXT STEPS

Over the next two months TRCA will work with Zerofootprint on finalizing the tool and beginning to market it. Building Performance Team members are encouraged to provide input into the tool and identify ways they can use the tool with their clients.

Report prepared by: Chris Rickett, extension 5316

For more information contact: Chris Rickett, extension 5316

Date: November 4, 2011

Item 3

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: **ENERGY BENCHMARKING WORKSHOP SERIES**

KEY ISSUE

To provide input and guidance on the development of an energy benchmarking workshop series that can be targeted at different sectors within the Pearson Eco-Business Zone and beyond.

WORKSHOP CONCEPT

It is proposed the Energy Benchmarking Workshop Series will be target marketed at specific sectors to help them better understand their energy consumption in relation to similar types of operations, while providing a format for sharing best management practices, learning to improve their operations and identifying capital upgrades, all targeted to assist in reducing their energy costs.

Workshop Agenda

The format of the proposed workshop series will involve using a host facility, which will enable not only a learning element, but an interactive tour that will enable the learning modules to be demonstrated within a real-life facility. The agenda will include the following learning modules:

- A review of top-performing buildings to identify building systems, management and operational opportunities for attendees.
- A peer-to-peer sharing element that would allow attendees to learn from each other.
- An overview of the incentives that are available for the sector based on typical opportunities.
- A facility tour that will include highlighting best practices for operations and management in relation to energy management for that respective sector with a focus on re-commissioning and running the building right.
- A wrap up discussion on lessons learned and next steps for each participant.

Participant Outcomes

By participating in this full-day session, participants will receive the following:

- A benchmarking report of their energy use against similar buildings to establish performance standards and conservation potential of their operations.
- An overview of the incentives available for the company's conservation opportunities.
- A hands on training session that will enable them to learn how to improve energy efficiency of their respective facility.

Workshop Goals

The objectives of these workshops are to:

- Promote incentive programs available to local companies in relation to the opportunities identified.
- Move companies towards implementing the solutions identified through their benchmarking report.
- Realize verifiable energy conservation savings.
- Generate leads to work with companies on energy conservation opportunities.

Workshop Requirements

Attendees will be required to sign-off on releasing their energy data to Partners in Project Green.

WORKSHOP DEVELOPMENT

While the above provides an overview of the workshop concept, a number of issues will need to be resolved, including:

- Facilitation – identify and secure a facilitator.
- Benchmarking Software – identify and secure benchmarking software that can be utilized for the workshop.
- Benchmarking Report – identify and secure a consultant who can complete the benchmarking reports.

In addition, the role of the local utilities in the process will need to be refined, including issues around data sign-off, potential sponsorship, marketing, and incentive education and follow-up.

NEXT STEPS

Based on the input of the Building Performance Team, TRCA staff will engage the local utilities in developing and refining the proposed workshop for 2012.

Report prepared by: Chris Rickett, extension 5316

For more information contact: Chris Rickett, extension 5316

Date: November 4, 2011

Item 4

TO: Members of the Partners in Project Green – Building Performance Team
FROM: Chris Rickett, Senior Project Manager, Partners in Project Green
RE: **ENERGY EFFICIENT TECHNOLOGY SERIES**

KEY ISSUE

Update on the development of the Energy Efficient Technology Series to be delivered in 2012.

BACKGROUND

Partners in Project Green is working with Willis Energy to develop and deliver a series of sessions focusing on different energy efficient technologies. Willis Energy is under contract to Enersource Mississauga to promote and deliver Conservation Demand Management (CDM) programming in their service area.

The purpose of this series is to disseminate information on energy efficient building technologies to businesses in the Pearson Eco-Business Zone and beyond. The following three sessions are proposed:

- February – HVAC Technology Showcase
- June – Lighting Technology Showcase
- October - Building Envelope Technology Showcase

FORMAT

The morning sessions will consist of case study examples of the technologies being showcased, a panel discussion and a vendor showcase.

- The case studies will be delivered by companies who have implemented technologies from the Vendor Profile sponsors and would like to share their success stories.
- The panel discussion will consist of the two case study companies and one to two technology experts (these experts are to be determined).
- The vendor showcase will consist of technology vendors and utility partners.

The proposed agenda is as follows:

8:00 – 9:00 am	Breakfast and Registration
9:00 – 9:30 am	Applicable Conservation Demand Management (CDM) Programs
9:30 – 10:00 am	Case Study example
10:00 – 10:30 am	Case Study example
10:30 – 11:00 am	Panel Discussion and Questions
11:00 – 12:00 pm	Vendor Showcase

FINANCIAL CONSIDERATIONS

The following is a rough budget of the costs per session:

Facility Costs – Free
Food - \$2,000 (attendance of up to 120 people)
Staff time - \$5,000

To cover these costs sponsorships will be secured from utility partners through the Greater Toronto Area and participating vendors.

Report prepared by: Jennifer Taves, extension 5570

For more information contact: Jennifer Taves, extension 5570

Date: November 4, 2011

Item 5

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: **GREEN TECHNOLOGY WEBINAR SERIES**

KEY ISSUE

Provide input on and develop the Green Technology Webinar Series schedule for 2012.

BACKGROUND

As a way to help promote the Clinton Climate Initiative (CCI) Purchasing Alliance (PA) to businesses across the Greater Toronto, CCI, Toronto and Region Conservation (TRCA), Canada Green Building Council – Toronto Chapter (CaGBC-T) and Greening Greater Toronto (GGT) have been hosting monthly green building technology product webinars.

These webinars have focused on highlighting the latest in building technologies, identifying barriers and opportunities for installation, showcasing existing installations and providing an opportunity for attendees to ask questions to product manufacturers. The webinars have often supported products from the CCI PA; however, other technologies not included in the PA have also been showcased.

The webinars average around 35 participants each month and they are each recorded so they can be downloaded for future reference from the Partners in Project Green website.

WEBINAR STRUCTURE

The agenda that each webinar follows is consistent and is as follows:

1. Introduction (1 minute)
2. Overview of Product (5 minutes) – should provide a brief product description that includes price, return on investment and availability.
3. Challenges / Opportunities (5 minutes) – should provide factors for success (i.e. building characteristics, etc.), as well as tangible and intangible benefits.
 - Rules – brief description, including price and availability.
4. Case Studies (10 minutes) – should provide examples of installations, including pricing, benefits incurred, challenges and simple pay back.
5. Question / Answer (10 minutes)

2012 WEBINAR SCHEDULE

TRCA staff is currently developing the 2012 Green Technology Webinar Series schedule would like input from the Building Performance Team on technologies and / or vendors they would like to see profiled.

Report prepared by: Jennifer Taves, extension 5570

For more information contact: Jennifer Taves, extension 5570

Date: November 4, 2011

Item 6

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: **ECO-EFFICIENCY CONSULTANT ROSTER SCORECARD CRITERIA**

KEY ISSUE

To review and approve the proposed Eco-Efficiency Consultant Roster Scorecard Criteria for use by TRCA and Partners in Project Green for adding consultants to its roster of consultants.

BACKGROUND

At the Partners in Project Green Steering Committee Meeting #1/11 the following recommendation was approved:

THAT the Partners in Project Green Energy Management Consultant Roster be endorsed and forwarded to the Toronto and Region Conservation Authority Board for approval and execution of necessary documents.

This recommendation was approved the Toronto and Region Conservation Authority Board and three consultants were added to the Energy Management Consultant Roster.

The Energy Management Consultant Roster is used when Partners in Project Green clients have an interest in completing a detailed energy assessment and require consulting expertise to complete the project. TRCA staff provides clients with the list of consultants so that they can choose a vendor to work with. If the consultant is successful in securing a contract with the client, TRCA is provided a 15 per cent commission in exchange for the referral.

ECO-EFFICIENCY CONSULTANT ROSTER SCORECARD DEVELOPMENT

In order to increase the number of consultants available on the roster and create a transparent process for getting onto the consultant roster, TRCA staff is recommending a scorecard based approach that will permit consultants the opportunity to be reviewed and added to the roster on an ongoing basis.

Attached to this document is the proposed Eco-Efficiency Consultant Roster Scorecard for the Building Performance Team's review.

NEXT STEPS

Based on the input of the Building Performance Team, TRCA staff will continue to finalize the scorecard and seek approval from the Partners in Project Green Steering Committee for its implementation.

Report prepared by: Chris Rickett, extension 5316

For more information contact: Chris Rickett, extension 5316

Date: November 4, 2011

Attachments:

Draft Eco-Efficiency Consultant Roster Scorecard

Item 7

TO: Members of the Partners in Project Green – Building Performance Team

FROM: Chris Rickett, Senior Project Manager, Partners in Project Green

RE: ENERGY LEADERS CONSORTIUM REQUEST FOR PROPOSAL REVIEW

KEY ISSUE

To review funding opportunities and provide an update on the selection of a facilitator and energy management software solution for the Energy Leaders Consortium.

BACKGROUND

TRCA has launched an Energy Leaders Consortium among local manufacturers to drive energy conservation even further within their facilities and demonstrate their successes to the broader business community. Membership is open to manufacturers who have already made significant strides towards energy conservation. By working together to leverage best practices, the knowledge of the group, interactive training and energy management software, the participating companies will drive conservation into their operations by adopting continuous improvement models for energy management.

At the July 13, 2011 meeting of the Building Performance Team, the team reviewed two draft Requests for Proposals (RFPs) to procure energy management software and professional facilitation services for the consortium. The comments of the team were incorporated and the RFPs were released August 29, 2011. These services provide the group with a common framework for collaboration, a vehicle for engaging more decision makers in their organizations, the focus to drive their innovations to implementation, and a method of verifying their savings.

Nine organizations attended the consortium session on September 28th, 2011 held at Husky Injection Molding. The dual themes of the meeting were: live demand response, and engaging energy consuming departments not directly accountable for energy costs. The next consortium meeting is scheduled for December 7th, 2011 at the Greater Toronto Airports Authority.

FUNDING OPPORTUNITIES AND THE VALUE PROPOSITION TO MEMBERS

A funding application to the Ontario Power Authority's Conservation Fund was unsuccessful. TRCA is currently pursuing funding opportunities with Enbridge Gas Distribution and Natural Resources Canada. The goals of the consortium – to integrate energy management into the decision making of member organizations and to drive energy conservation – closely align with the objectives of the two potential funders, but will require some adjustments to the consortium model.

Natural Resources Canada has launched a pilot program to help fund manufacturers to prepare for ISO 50001 certification under the new energy management standard. This funding would require that the consortium members specifically commit to ISO 50001.

Enbridge has asked that consortium members pay a deposit of 50% of the funding amount to ensure commitment of the members. This amount would be reimbursed upon completion of the program.

TRCA is planning to present the funding opportunities and their incumbent commitments to members in advance of the December 7th meeting of the consortium. Funding from both Enbridge and Natural Resources Canada will allow the consortium to proceed with both expert facilitation and an energy management software service.

PROFESSIONAL FACILITATION AND ENERGY MANAGEMENT SOFTWARE

At the Sept 28th consortium meeting, a team consisting of two participating companies (Bayer and Broan-Nutone) and TRCA was formed to evaluate and select the professional facilitator and software solution.

11 software proposals and 6 facilitation proposals were received. The team has short-listed 2 software vendors and 3 firms for professional facilitation. Interviews and software demonstrations are being held the week of November 7, 2011. The preferred vendors are expected to enter an agreement with TRCA in late 2011, pending confirmation of funding.

NEXT STEPS

Based on the input of the Building Performance Team, TRCA will work with funders and consortium members to proceed with the consortium supported by facilitation and energy management software. Team members are encouraged to recommend manufacturers with an interest and experience in energy conservation to join the consortium.

Report prepared by: Dennis Braun, extension 5594

For more information contact: Dennis Braun, extension 5594

Date: November 4, 2011

Attachments:

Request for Proposals – Energy Management Software

Request for Proposals – Energy Leaders Consortium Facilitation and Training



Eco-Efficiency Consultant Roster Scorecard

1. Background

Partners in Project Green is a growing community of businesses working together to green their bottom line and to create an internationally-recognized eco-business zone by re-branding the industrial areas around Toronto Pearson International Airport as the Pearson Eco-Business Zone.

Through new forms of business-to-business collaboration, Partners in Project Green delivers programming that helps businesses reduce energy and resource costs, uncover new business opportunities, and address everyday operational challenges in a green and cost-manner.

One of the initiatives Partners in Project Green delivers is the Eco-Efficiency Program which designed to help companies in the manufacturing, logistics / warehouse, commercial office and hospitality sectors identify ways to reduce their resource costs through energy, waste and water conservation measures.

The Eco-Efficiency Program provides a cost-free visit from Partners in Project Green staff to identify high-level resource reduction opportunities, an initial report, implementation assistance (i.e. filling out financial assistance applications) and, if required, referrals to consultants who can complete detailed assessments of building envelope and process opportunities for reducing costs.

The Eco-Efficiency Consultant Roster Scorecard is designed as a way to add to consulting companies to the Partners in Project Green's Consult Roster, which is then shared with participating companies to hire consultants to complete Detailed Eco-Efficiency Assessments.

2. Program Overview

Under the Eco-Efficiency Program, TRCA and Partners in Project Green will provide verified leads to partnering consultants after completing the following process:

- Lead Generation – working with its municipal, utility and business partners, Partners in Project Green generates leads for companies who are interested in eco-efficiency opportunities.
- Initial Meeting & Scoping – Partners in Project Green holds an initial meeting with interested companies, often in partnership with Enbridge and electrical distribution companies, to review their resource use, identify high-level opportunities and determine their interest in hiring an outside expert to help reduce their resource consumption.
- Referral – companies who are interested in outside expertise for detailed assessments are referred to up to 3 partnering consultants, selected based on the interests of the client and the expertise of the consultants.

Partnering consultants who receive referrals from TRCA and Partners in Project Green agree to the following activities:

- Submit a proposal of services to the client to complete an assessment, implementation plan, or similar.
- Provide a finder's fee to TRCA equal to 15 per cent of the value of services delivered to clients referred by Partners in Project Green.
- Provide the client and TRCA with a final report using the headings provided in Appendix A.

3. Eco-Efficiency Consultant Roster Scorecard Overview

TRCA is dedicated to helping businesses in the Pearson Eco-Business Zone achieve real environmental benefits and improve their bottom line. To facilitate this goal, consultants are scored based on the following criteria:

1. **Independent Consultant (Required)** – Consultants must not have any financial interest in the manufacture or sales of specific energy management equipment or technologies.
2. **Energy Management Expertise (40%)** – Qualifications and Experience of Team Members
3. **Energy Management Process (20%)** – Well defined, consistent and proven approach to energy management
4. **Professional References (40%)** – For each major sector within manufacturing, warehousing, and office, if available. Provide evidence of a track record of client implementation and verified energy reductions alongside excellent customer service. Include a minimum of 2 completed client reports with confidential information removed.

In addition, consultants are reviewed based on their ability to meet the Partners in Project Green Public-Private Marketing Collaboration Evaluation Criteria which can be found detailed in Appendix B. The Public-Private Marketing Collaboration Criteria is developed in order to provide an overview of the typical elements that TRCA looks for when considering a product and/or service marketing collaboration to serve companies within the Pearson Eco-Business Zone.

The following are the considerations that TRCA reviews:

1. **Operations within the Pearson Eco-Business Zone** - this supports and promotes businesses within the Pearson Eco-Business Zone and stimulates relationships among Partners in Project Green companies.
2. **Partners in Project Green Partner or Business Ambassador** - this rewards members for participation and ensures familiarity with the goals of Partners in Project Green.
3. **Publish a Corporate Sustainability Report** - this provides transparency and accountability in regards to the company's commitment to sustainability.
4. **Contributes to promote the goals of Partners in Project Green** - it is important to include vendors who understand and promote Partners in Project Green goals in order to ensure the overall success of projects.
5. **Recognized Environmental Leader** - this recognizes and rewards environmental leaders for their work, and also ensures the high environmental standards are adhered to. This will be measured by media reports, third party verifications, and overall reputation.
6. **Established Relationship with Pearson Eco-Business Zone Companies** - vendors with pre-existing relationships will have specialized knowledge of the needs of businesses in the Pearson Eco-Business Zone and provide an opportunity to develop new business connections for Partners in Project Green.

7. **Environmental Product Certifications** – the company has its products and/or services certified by third-party or government environmental certifications in order to ensure companies in the Pearson Eco-Business Zone are utilizing the highest level of environmental standards in products and services.

4. Eco-Efficiency Consultant Roster Approval Process

Organizations that have an interest in being included in the Partners in Project Green Eco-Efficiency consultant Roster can make application at any time.

All applications are reviewed and recommended for inclusion by the Partners in Project Green Building Performance Team, which includes representation from local electric distribution companies, Enbridge Gas Distribution, partner municipalities and businesses from the Pearson Eco-Business Zone.

Respondents should include their company's background and experience, while focusing on highlight how they meet the scorecard's requirements, using the headings provided in the scorecard. All applications should be submitted via email as a Word or PDF document to:

Dennis Braun

dbraun@trca.on.ca

Subject: Partners in Project Green – Eco-Efficiency Consultant Roster

Unnecessarily elaborate brochures, artwork, bindings, expensive paper or other materials beyond a complete and effective submission are not required.

All proposals become the property of the TRCA upon receipt and will not be returned. Any information deemed to be confidential by a respondent should be clearly noted on the page(s) where confidential information is contained.

Any cost or expense incurred by a respondent that is associated with the preparation of the Application, if any, or during any phase of the selection process, shall be borne solely by the respondent.

To be added to the Eco-Efficiency Consultant Roster, a company must score 80 per cent on the scorecard, meet at least 4 of the 7 criteria from the Partners in Project Green Public-Private Marketing Collaboration Evaluation Criteria, and be willing to provide a 15 per cent finder's fee to TRCA and Partners in Project Green for any projects that result from a referral.

The Eco-Efficiency Consultant Roster Scorecard does not commit TRCA to enter into a contract with all applicants, and TRCA reserves the right, based on the input of the Partners in Project Green Building Performance Team to award a contract to consultants who are deemed to provide the best value for TRCA, Partners in Project Green and its partner companies.

5. Eco-Efficiency Consultant Roster Scorecard

The following is the scorecard that consultants will be scored against. Consultants must score 80 per cent on the scorecard and meet at least 4 of the 7 criteria from the Partners in Project Green Public-Private Marketing Collaboration Evaluation Criteria.

Eco-Efficiency Consultant Roster Scorecard

Criteria	Score	Rational
Independent Consultant (Required) – Consultants must not have any financial interest in the manufacture or sales of specific energy management equipment or technologies.		Yes / No – if no, consultant disqualified.
Energy Management Expertise (40%) – Qualifications (education) and Experience (years of experience and clients) of Team Members.		<ul style="list-style-type: none"> • 0% - no expertise or education. • 10% education – all team members have PEng, CET or CEM designations. • 15% years of experience: <ul style="list-style-type: none"> ○ 0% - no years of experience ○ 5% - 2 years and under of experience ○ 10% - 5 years and under of experience ○ 15% - over 5 years of experience • 15% number of clients: <ul style="list-style-type: none"> ○ 0% - no clients ○ 5% - 5 or under clients listed ○ 10% - 10 or under clients ○ 15% - over 10 clients
Energy Management Process (20%) – Well defined, consistent and proven approach to energy management.		<ul style="list-style-type: none"> • 0% - no energy management process defined. • 10% - defined energy management process. • 20% - well defined and consistent energy management process that is reflected in sample client reports (supported by references).
Professional References (40%) – For each major sector (manufacturing, hospitality, warehousing, and office) you wish to provide services for, you must provide 2 references that include a client testimonial and verified savings (confidential information can be removed).		<ul style="list-style-type: none"> • 0% - no references. • 20% - one positive reference with verified savings for each proposed sector. • 40% - two positive references with verified savings for each proposed sector.

Partners in Project Green Public-Private Marketing Collaboration Evaluation Criteria

Criteria	Meet (Yes/No)	Notes
Operations within the Pearson Eco-Business Zone		

Partners in Project Green Partner or Business Ambassador		
Publish a Corporate Sustainability Report		
Contributes to promote the goals of Partners in Project Green		
Recognized Environmental Leader		
Established Relationship with Pearson Eco-Business Zone Companies		
Environmental Product Certifications		

Appendix A: Eco-Efficiency Assessment Report Headings

The following are the report headings that must be used for client Eco-Efficiency Assessment reports:

1. Title Page
 - Name of Company
 - Location of facility
 - Date of the Report
 - Name of the Audit Contractor
2. Table of Contents
3. Executive Summary
 - Opportunities identified
 - Priorities indicated
 - Savings quantified
 - Costs of Implementing
 - Recommendations
4. Clearly defined Scope for the Audit
5. Description of current situation
 - Baseline Annual Consumption & Costs
6. Equipment/process information
7. On-site /walk through notes
8. Safety Issues
9. Explanation of Measures and calculation of savings
10. Appendices

Appendix B: Public-Private Marketing Collaboration Criteria



Public-Private Marketing Collaborations with Toronto and Region Conservation Authority and Partners in Project Green

January, 2010

Introduction

Your business shares in the wide-spread interest in sustainability. Toronto and Region Conservation Authority (TRCA) welcomes opportunities to help organizations act on their genuine concerns for the environment and is open to commercial partnership opportunities that are good for your business, TRCA and businesses within the Pearson Eco-Business Zone.

Two of TRCA's central strengths, our science base and our business-like approach, make us positively disposed to working *with* business, in the interests of environmental improvement. TRCA already enjoys a number of productive partnerships with Canadian businesses and we will work hard to help other companies support sustainability.

TRCA is a respected environmental organization that stewards nine watersheds within the Toronto region. The nine watersheds are home to more than three million people - one third of Ontario's population. It is within this jurisdiction that TRCA's Living City vision delivers watershed protection programs to achieve:

- **Healthy Rivers and Shorelines**
 - To restore the integrity and health of the regions rivers and waters from the headwaters in the Oak Ridges Moraine, throughout each of the nine watersheds in TRCA's jurisdiction, to the Toronto waterfront on Lake Ontario
- **Regional Biodiversity**
 - To protect and restore a regional system of natural areas that provide habitat for plants and animal species, improve air quality and provide opportunities for the enjoyment of nature.
- **Sustainable Communities**
 - To facilitate broad community understanding, dialogue and action toward integrated approaches to sustainable living and city building that improves the quality of life for residents, businesses and nature.
- **Business Excellence**

- To pursue continuous improvement in the development and delivery of all programs through creative partnerships, diverse funding sources and careful auditing of outcomes and effectiveness.

Partners in Project Green is one of the programs that TRCA delivers to reach these goals. Partners in Project Green is a growing community of businesses working together to green their bottom line by creating an internationally-recognized 'eco-business zone' around Toronto Pearson.

Through new forms of business-to-business collaboration, Partners in Project Green delivers programming that helps businesses reduce energy and resource costs, uncover new business opportunities, and address everyday operational challenges in a green and cost-effective manner. The goals of Partners in Project Green include:

- **Green Business Capacity**
 - Build general awareness and capacity for eco-business and eco-development among partners and throughout the business community, demonstrating that the simultaneous pursuit of economic and ecological goals results in greater benefits for business.
- **Triple Bottom Line Green Business Results**
 - Implement collaborative green business projects and programs that create triple bottom line benefits for all involved, assisting businesses in improving their financial and environmental performance.
- **Municipal Capacity and Investment Attraction**
 - Build municipal capacity and support for eco-economic development on the regions employment lands, and attract and retain investments in the region.

For an organization that trades on public trust, integrity is central to success. Our partnerships must recognize that the integrity TRCA and Partners in Project Green is central to getting our job done and to continually attract more financial partners. The name and trademark of TRCA and Partners in Project Green must always be associated with top-notch work whether in the areas of public awareness, project management, or commercial relationships.

To this end, our Public-Private Marketing Collaboration Evaluation Criteria and Terms of Commercial Collaboration have been developed. These terms are not perfect or exhaustive. However, they will help you understand in advance important ground for us to negotiate. They are also a matter of record to help our supporters understand how we assess potential commercial relationships.

It is possible that, even though a collaboration technically meets all of these terms, other considerations particular to the relationship may suggest that the collaboration would still not be in the best interests of TRCA and Partners in Project Green.

Public-Private Marketing Collaboration Evaluation Criteria

The Public-Private Marketing Collaboration Criteria is developed in order to provide an overview of the typical elements that TRCA looks for when considering a product and/or service marketing collaboration to serve companies within the Pearson Eco-Business Zone.

The following are the considerations that TRCA reviews:

1. **Operations within the Pearson Eco-Business Zone** - this supports and promotes businesses within the Pearson Eco-Business Zone and stimulates relationships among Partners in Project Green companies.
2. **Partners in Project Green Partner or Business Ambassador** - this rewards members for participation and ensures familiarity with the goals of Partners in Project Green.
3. **Publish a Corporate Sustainability Report** - this provides transparency and accountability in regards to the company's commitment to sustainability.
4. **Contributes to promote the goals of Partners in Project Green** - it is important to include vendors who understand and promote Partners in Project Green goals in order to ensure the overall success of projects.
5. **Recognized Environmental Leader** - this recognizes and rewards environmental leaders for their work, and also ensures the high environmental standards are adhered to. This will be measured by media reports, third party verifications, and overall reputation.
6. **Established Relationship with Pearson Eco-Business Zone Companies** - vendors with pre-existing relationships will have specialized knowledge of the needs of businesses in the Pearson Eco-Business Zone and provide an opportunity to develop new business connections for Partners in Project Green.
7. **Environmental Product Certifications** – the company has its products and/or services certified by third-party or government environmental certifications in order to ensure companies in the Pearson Eco-Business Zone are utilizing the highest level of environmental standards in products and services.

TRCA Terms of Agreement

After a review of the product and/or services of the commercial collaboration, an agreement will be developed with the vendor that will ensure that parties to the collaboration will:

1. Define with us a mutually beneficial agreement.
2. Respect our internal approval process.
3. Sign a standard, legal agreement which contains a clause about our partner's environmental efforts.
4. Pay fees (sometimes in services or in kind) that will help finance TRCA and Partners in Project Green's work in the Pearson Eco-Business Zone.
5. Obtain TRCA's approval for all copy and logo use.

6. Evaluate the commercial, public awareness or conservation success of the partnership and share the results of this evaluation with TRCA. This helps us understand how well we have helped meet ours and our partners' objectives.
7. Understand that TRCA does not endorse products. Rather, our collaboration supports sustainability by endorsing the general activities or a specific program of TRCA. If the collaboration involves a product, the relationship between TRCA and the product is made clear to the public; usually on a hang-tag, or on a label, or in display materials. Sample wording:

XYZ Corp is pleased to endorse the work of TRCA and Partners in Project Green. A portion of the proceeds from the sale of this product will go to TRCA to help finance projects in the Pearson Eco-Business Zone.

8. Define indemnification requirements and liability of TRCA.
9. Agree to terms that quantify the agreements review and renewal.
10. Define with us, through our standard agreement, whether or not the collaboration is an exclusive relationship with TRCA. Occasions can arise when TRCA has completed a collaboration with a business that may be considered to be a competitor of our new prospective collaborator. As a matter of courtesy, and to avoid possible market confusion, we will notify and consult with the previous collaborator prior to concluding a new proposal from a competitor.

Depending on the nature of the relationship, our collaborators:

11. Make a substantial commitment to a new environmental initiative within the company as a result of collaboration with TRCA.
12. Are evaluated on their environmental performance by an outside agency, for example, EthicScan Ltd. TRCA shares information from this evaluation openly with the company.



**Request for Proposals
Energy Management Software**

RFP Release Date: August 29, 2011
Submissions Due: September 21, 2011

I. BACKGROUND

The Toronto and Region Conservation Authority (TRCA) seeks Proposals from qualified Respondents interested in providing services as described in this Request for Proposals (RFP) for facilitation and training in support of Partners in Project Green's Energy Leaders Consortium.

Partners in Project Green is a growing community of businesses working together to green their bottom line and to create an internationally-recognized 'eco-business zone' by re-branding the industrial areas around Toronto Pearson International Airport as the Pearson Eco-Business Zone.

Through new forms of business-to-business collaboration, Partners in Project Green delivers programming that helps businesses reduce energy and resource costs, uncover new business opportunities, and address everyday operational challenges in a green and cost-effective manner.

II. ENERGY LEADERS CONSORTIUM

Partners in Project Green is launching an Energy Leaders Consortium designed to help local manufacturers achieve energy conservation through standard and innovative solutions, and to integrate energy management into their core decision making processes.

The consortium will consist of up to 18 member organizations and TRCA. Local energy management leaders will be invited to join the consortium based on past efforts to achieve energy reductions, and commitment to attending consortium sessions, sharing with the consortium members, and continuing to pursue energy conservation. The consortium will focus on peer-to-peer exchanges to leverage the experiences of the members to find opportunities for conservation and solutions to difficult challenges.

The consortium will meet 6 times over a 12-month period. Each half-day session will include the following components:

- **Rotating hosts:** Each meeting will be hosted by a different member.
- **Report out by members:** New initiatives or updates since the previous meeting.
- **Presentation by the host:** Overview of their energy management story and initiatives, highlighting their biggest success and biggest challenge
- **Tour of their facility:** Tour of operations, highlighting energy management initiatives and challenge areas.
- **Group discussion:** Input and discussion of the themes. Additionally, each participant will be challenged to identify one idea that they will bring back to their organization, and one suggestion for the host.

Additionally, the first 3 meetings will include a formal training component to be delivered at the host facility. The training will be intended to provide participants with the background and frameworks to successfully develop and integrate an energy management plan in their organizations.

Consortium members will use a common energy management software solution to support their efforts. The software will be updated and accessed by the individual members as well as TRCA and a third party facilitator.

As with any mixed group, there will be a range of backgrounds, experiences, and expertise with energy management. However, many participants will have experience implementing energy management projects.

III. SOFTWARE SPECIFICATIONS

TRCA is searching for an energy management software solution that will support the objectives and format of the Energy Leaders Consortium.

Primary Functionality

- **Data Tracking:** Import and track interval-metered energy consumption data.
- **Benchmarking:** Benchmark energy consumption against appropriate measures. These might include amount of energy per square foot, production, material input, industry average, or other relevant metrics.
- **Reporting:** Support reporting

Desired Functionality

- **Equipment Inventory:** Inventory energy consumption and demand information for equipment.
- **Opportunity Identification and Analysis:** Identify potential energy conservation opportunities from energy consumption data and equipment inventory. Estimate energy, cost, and GHG savings from identified opportunities.
- **Project Management:** Functionality to manage the analysis and implementation of conservation opportunities. Track implementation against energy consumption trends.

Centralized Access

- **Centralized Access:** Individual consortium member organizations will be the primary users of the software at their respective facilities. Ideally, member data will also be input and accessed by TRCA and a third party facilitator from outside locations.
- **Access Levels:** Allow members to limit the data that TRCA and the third party facilitator can access. Individual members should only be able to access their own data.

Licensing

The consortium will require licenses for up to 18 member organizations for a minimum of 1 year, with an option to renew. Member organization licences will be used internally to their organization.

The consortium will require 2 licences for the consortium administrating organizations. These licences will be used to update and access information from the member organization accounts. The licences will be valid for a minimum of 1 year with an option to renew.

Pricing

Provide a unit cost formula for up to 18 member organization licenses and 2 administrative licenses as described above in this RFP.

The total cost for energy management software licensing and fees must not exceed an upset limit of \$40,000.

Business Collaboration Opportunities

Respondents are requested to suggest possible opportunities to off-set costs to Partners in Project Green and our member businesses in exchange for business development opportunities and referrals.

Possible examples include:

- Discounts on licensing costs to businesses for referrals made by Partners in Project Green
- Commission provided to Partners in Project Green for referrals
- Sponsorship in exchange for marketing opportunities

Please note this list is by no means exhaustive and Respondents are encouraged to suggest models outside of this list

Respondents will be evaluated on the suggested collaboration models. Final development of those models is contingent on conformance with the “Public- Private Marketing Collaborations with Toronto and Region Conservation Authority and Partners in Project Green” document (please see Appendix A).

III. SUBMISSION OF PROPOSALS

Respondent shall submit one (1) original copy:

- 1) By email with a cover letter proposal in PDF or WORD format. Email submissions over 5MB may not be received.

All proposals must be received by TRCA no later than **September 21, 2011**.

Please send all proposals or inquiries care of:

Dennis Braun

dbraun@trca.on.ca

Subject: RFP – Energy Management Software

Proposal Format:

Submit a proposal that fully and concisely details the proposal of the respondent, indicating how the proposed solution meets each of the software specifications. Provide a price per user license, price per administrator license, and a total package price.

Unnecessarily elaborate brochures, artwork, bindings, expensive paper or other materials beyond a complete and effective submission are not required.

All provisions in Respondent's proposal, including any estimated or projected costs, shall remain valid for 90 days following the deadline date for submissions or, if a proposal is accepted, throughout the entire term of the contract.

All proposals become the property of the TRCA upon receipt and will not be returned. Any information deemed to be confidential by Respondent should be clearly noted on the page(s) where confidential information is contained.

Any cost or expense incurred by the Respondent that is associated with the preparation of the Proposal, if any, or during any phase of the selection process, shall be borne solely by Respondent.

IV. EVALUATION CRITERIA

TRCA will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. Members of the Partners in Project Green – Building Performance Team will evaluate the Proposals received in response to this RFP.

Each Proposal will be analyzed to determine overall responsiveness and qualifications under the RFP. Criteria to be evaluated may include the items listed below. The selection committee may select all, some or none of the Respondents for interviews. If TRCA elects to conduct interviews, Respondents may be interviewed and re-scored based upon the same criteria, or other criteria to be determined by the evaluation team. The TRCA may also request additional information from Respondents at any time prior to final approval of a selected Respondent. The TRCA reserves the right to select one, or more, or none of the Respondents to provide services.

Final approval of a selected Respondent is subject to the action of TRCA Board of Directors.

Evaluation criteria:

- A. Availability and Quality of Primary Functionality (30%)
- B. Availability and Quality of Desired Functionality (15%)
- C. Availability and Centralized Access Functionality (10%)
- D. Ease of Use (20%)
- E. Price (20%)
- F. Business Collaboration Opportunities (5%)

V. AWARD OF CONTRACT

TRCA reserves the right to award one, more than one or no contract(s) in response to this RFP. The Contract, if awarded, will be awarded to the Respondent whose Proposal is deemed most advantageous to TRCA and Partners in Project Green, as determined by the evaluators, upon approval of the TRCA Board of Directors.

TRCA may accept any Proposal in whole or in part. If subsequent negotiations are conducted, they shall not constitute a rejection or alternate RFP on the part of TRCA. However, final selection of a Respondent is subject to TRCA Board of Directors approval.

TRCA reserves the right to accept one or more proposals or reject any or all proposals received response to this RFP, and to waive informalities and irregularities in the proposals received. TRCA also reserves the right to terminate this RFP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFP process.

No work shall commence until TRCA signs the contract document and the Respondent provides the necessary evidence of insurance as required in this RFP and the Contract.

In the event the parties cannot negotiate and execute a contract within the time specified, TRCA reserves the right to terminate negotiations with the selected Respondent and commence negotiations with another Respondent.

This RFP does not commit TRCA to enter into a Contract, award any services related to this RFP, nor does it obligate TRCA to pay any costs incurred in preparation or submission of a proposal or in anticipation of a contract.

If selected, the Respondent will be required to comply with the Insurance and Indemnification Requirements established herein.

VI. SCHEDULE OF EVENTS

The following is a list of the projected dates and times with respect to this RFP:

RFP Issue Date	-	August 29, 2011
Last Day for Questions	-	September 14, 2011
Proposals Due	-	September 21, 2011
Respondent Interviews	-	October 2011
Respondent Selection	-	October 2011
Work Commence	-	November 2011
Work Complete	-	November 2011

Appendix A



Public-Private Marketing Collaborations with Toronto and Region Conservation Authority and Partners in Project Green

January, 2010

Introduction

Your business shares in the wide-spread interest in sustainability. Toronto and Region Conservation Authority (TRCA) welcomes opportunities to help organizations act on their genuine concerns for the environment and is open to commercial partnership opportunities that are good for your business, TRCA and businesses within the Pearson Eco-Business Zone.

Two of TRCA's central strengths, our science base and our business-like approach, make us positively disposed to working *with* business, in the interests of environmental improvement. TRCA already enjoys a number of productive partnerships with Canadian businesses and we will work hard to help other companies support sustainability.

TRCA is a respected environmental organization that stewards nine watersheds within the Toronto region. The nine watersheds are home to more than three million people - one third of Ontario's population. It is within this jurisdiction that TRCA's Living City vision delivers watershed protection programs to achieve:

- **Healthy Rivers and Shorelines**
 - To restore the integrity and health of the regions rivers and waters from the headwaters in the Oak Ridges Moraine, throughout each of the nine watersheds in TRCA's jurisdiction, to the Toronto waterfront on Lake Ontario
- **Regional Biodiversity**
 - To protect and restore a regional system of natural areas that provide habitat for plants and animal species, improve air quality and provide opportunities for the enjoyment of nature.
- **Sustainable Communities**

- To facilitate broad community understanding, dialogue and action toward integrated approaches to sustainable living and city building that improves the quality of life for residents, businesses and nature.
- **Business Excellence**
 - To pursue continuous improvement in the development and delivery of all programs through creative partnerships, diverse funding sources and careful auditing of outcomes and effectiveness.

Partners in Project Green is one of the programs that TRCA delivers to reach these goals. Partners in Project Green is a growing community of businesses working together to green their bottom line by creating an internationally-recognized 'eco-business zone' around Toronto Pearson.

Through new forms of business-to-business collaboration, Partners in Project Green delivers programming that helps businesses reduce energy and resource costs, uncover new business opportunities, and address everyday operational challenges in a green and cost-effective manner. The goals of Partners in Project Green include:

- **Green Business Capacity**
 - Build general awareness and capacity for eco-business and eco-development among partners and throughout the business community, demonstrating that the simultaneous pursuit of economic and ecological goals results in greater benefits for business.
- **Triple Bottom Line Green Business Results**
 - Implement collaborative green business projects and programs that create triple bottom line benefits for all involved, assisting businesses in improving their financial and environmental performance.
- **Municipal Capacity and Investment Attraction**
 - Build municipal capacity and support for eco-economic development on the regions employment lands, and attract and retain investments in the region.

For an organization that trades on public trust, integrity is central to success. Our partnerships must recognize that the integrity TRCA and Partners in Project Green is central to getting our job done and to continually attract more financial partners. The name and trademark of TRCA and Partners in Project Green must always be associated with top-notch work whether in the areas of public awareness, project management, or commercial relationships.

To this end, our Public-Private Marketing Collaboration Evaluation Criteria and Terms of Commercial Collaboration have been developed. These terms are not perfect or exhaustive. However, they will help you understand in advance important ground for us to negotiate. They are also a matter of record to help our supporters understand how we assess potential commercial relationships.

It is possible that, even though a collaboration technically meets all of these terms, other considerations particular to the relationship may suggest that the collaboration would still not be in the best interests of TRCA and Partners in Project Green.

Public-Private Marketing Collaboration Evaluation Criteria

The Public-Private Marketing Collaboration Criteria is developed in order to provide an overview of the typical elements that TRCA looks for when considering a product and/or service marketing collaboration to serve companies within the Pearson Eco-Business Zone.

The following are the considerations that TRCA reviews:

1. **Operations within the Pearson Eco-Business Zone** - this supports and promotes businesses within the Pearson Eco-Business Zone and stimulates relationships among Partners in Project Green companies.
2. **Partners in Project Green Partner or Business Ambassador** - this rewards members for participation and ensures familiarity with the goals of Partners in Project Green.
3. **Publish a Corporate Sustainability Report** - this provides transparency and accountability in regards to the company's commitment to sustainability.
4. **Contributes to promote the goals of Partners in Project Green** - it is important to include vendors who understand and promote Partners in Project Green goals in order to ensure the overall success of projects.
5. **Recognized Environmental Leader** - this recognizes and rewards environmental leaders for their work, and also ensures the high environmental standards are adhered to. This will be measured by media reports, third party verifications, and overall reputation.
6. **Established Relationship with Pearson Eco-Business Zone Companies** - vendors with pre-existing relationships will have specialized knowledge of the needs of businesses in the Pearson Eco-Business Zone and provide an opportunity to develop new business connections for Partners in Project Green.
7. **Environmental Product Certifications** – the company has its products and/or services certified by third-party or government environmental certifications in order to ensure companies in the Pearson Eco-Business Zone are utilizing the highest level of environmental standards in products and services.

TRCA Terms of Agreement

After a review of the product and/or services of the commercial collaboration, an agreement will be developed with the vendor that will ensure that parties to the collaboration will:

1. Define with us a mutually beneficial agreement.
2. Respect our internal approval process.
3. Sign a standard, legal agreement which contains a clause about our partner's environmental efforts.
4. Pay fees (sometimes in services or in kind) that will help finance TRCA and Partners in Project Green's work in the Pearson Eco-Business Zone.
5. Obtain TRCA's approval for all copy and logo use.
6. Evaluate the commercial, public awareness or conservation success of the partnership and share the results of this evaluation with TRCA. This helps us understand how well we have helped meet ours and our partners' objectives.
7. Understand that TRCA does not endorse products. Rather, our collaboration supports sustainability by endorsing the general activities or a specific program of TRCA. If the collaboration involves a product, the relationship between TRCA and the product is made clear to the public; usually on a hang-tag, or on a label, or in display materials.
Sample wording:

XYZ Corp is pleased to endorse the work of TRCA and Partners in Project Green. A portion of the proceeds from the sale of this product will go to TRCA to help finance projects in the Pearson Eco-Business Zone.

8. Define indemnification requirements and liability of TRCA.
9. Agree to terms that quantify the agreements review and renewal.
10. Define with us, through our standard agreement, whether or not the collaboration is an exclusive relationship with TRCA. Occasions can arise when TRCA has completed a collaboration with a business that may be considered to be a competitor of our new prospective collaborator. As a matter of courtesy, and to avoid possible market confusion, we will notify and consult with the previous collaborator prior to concluding a new proposal from a competitor.

Depending on the nature of the relationship, our collaborators:

11. Make a substantial commitment to a new environmental initiative within the company as a result of collaboration with TRCA.
12. Are evaluated on their environmental performance by an outside agency, for example, EthicScan Ltd. TRCA shares information from this evaluation openly with the company.



Request for Proposals
Energy Leader Consortium – Facilitation and Training

RFP Release Date: August 29, 2011
Submissions Due: September 21, 2011

I. BACKGROUND

The Toronto and Region Conservation Authority (TRCA) seeks Proposals from qualified Respondents interested in providing services as described in this Request for Proposals (RFP) for facilitation and training in support of Partners in Project Green's Energy Leaders Consortium.

Partners in Project Green is a growing community of businesses working together to green their bottom line and to create an internationally-recognized 'eco-business zone' by re-branding the industrial areas around Toronto Pearson International Airport as the Pearson Eco-Business Zone.

Through new forms of business-to-business collaboration, Partners in Project Green delivers programming that helps businesses reduce energy and resource costs, uncover new business opportunities, and address everyday operational challenges in a green and cost-effective manner.

II. ENERGY LEADERS CONSORTIUM FORMAT

Partners in Project Green is launching an Energy Leaders Consortium designed to help local manufacturers achieve energy conservation through standard and innovative solutions, and to integrate energy management into their core decision making processes. The consortium will help members develop and integrate a high quality energy management plan and will develop a highly-connected group of peers who will work together beyond the lifespan of the project.

The consortium will consist of up to 18 member organizations and TRCA. Local energy management leaders will be invited to join the consortium based on past efforts to achieve energy reductions, and commitment to attending consortium sessions, sharing with the consortium members, and continuing to pursue energy conservation. The consortium will focus on peer-to-peer exchanges to leverage the experiences of the members to find opportunities for conservation and solutions to difficult challenges.

The consortium will meet 6 times over a 12-month period. Each half-day session will include the following components:

- **Rotating hosts:** Each meeting will be hosted by a different member.
- **Report out by members:** New initiatives or updates since the previous meeting.
- **Presentation by the host:** Overview of their energy management story and initiatives, highlighting their biggest success and biggest challenge
- **Tour of their facility:** Tour of operations, highlighting energy management initiatives and challenge areas.
- **Group discussion:** Input and discussion of the themes. Additionally, each participant will be challenged to identify one idea that they will bring back to their organization, and one suggestion for the host.

The first 3 half-day sessions will include a formal training component to be delivered by the successful respondent at the host facility. The training will be intended to provide participants with the background and frameworks to successfully develop and integrate an energy management plan in their organizations.

As with any mixed group, there will be a range of backgrounds, experiences, and expertise with energy management. However, many participants will have experience implementing energy management projects.

III. SCOPE OF SERVICES

The successful respondent will be responsible for the facilitation of 6 consortium sessions over a 12-month period, and the preparation and delivery of training materials. Preparation for each session is expected to include reviewing the members' energy data and advanced consultation with the session hosts.

Energy Management Workshops

The successful respondent will be responsible for providing all training materials. The proposal must include a training format and syllabus and describe how the training modules will meet the objectives of the consortium to develop and integrate a high quality energy management plan into their organizations and support continuous improvement among members. The proposal must make clear whether the respondent will be using existing materials or developing new materials for the training. TRCA will own training materials developed as part of this program.

A possible set of workshop modules is listed below. **The respondent is encouraged to recommend a different training program if they believe an alternate structure or content would better meet the objectives of the Energy Leaders Consortium.**

Session 1 – Energy Data and Supply Management

Preparation:

- Confirm data quality and review baseline date of each facility
- Develop training materials and related case study of host facility

Session Delivery:

- Training Module: Software, Energy Data Management, and Benchmarking
- Training Module: Energy Supply Management

Session 2 – Facility and Process Energy Use

Preparation:

- Review opportunities identified for each facility
- Develop training materials and related case study of host facility

Session Delivery:

- Training Module: Facility and Process Energy Use

Session 3 – Environmental Measurement and Organization Integration

Preparation:

- Review carbon footprint for each organization

- Develop training materials and related case study of host facility

Session Delivery:

- Training Module: GHG Emissions Calculations and Tracking
- Training Module: Organizational Integration of Energy Management

Expert Facilitation

The consortium is built on a model of peer-to-peer exchanges. The role of the facilitator will be to structure sessions, encourage dialogue, keep the exchanges productive, and ensure that all opportunities are captured. Additionally the facilitator will challenge the members to commit to continuous improvement, undertaking specific projects, and integrating energy management into their organizations' core decision making practices. Successful consortium facilitation will develop a highly-connected group of peers who will work together beyond the lifespan of the project.

Pricing

1. Provide a flat rate for the delivery of 6 consortium sessions, including the facilitation and training workshop components.
2. Provide a per-unit price for each organization that participates in the consortium, to a maximum of 18 member organizations. This cost reflects the incremental preparation costs incurred to the respondent, and value delivered to the member, for each participating organization.

III. SUBMISSION OF PROPOSALS

Respondent shall submit one (1) original copy:

- 1) By email with a cover letter proposal in PDF or WORD format

All proposals must be received by TRCA no later than **September 21, 2011**

Please send all proposals or inquiries care of:

Dennis Braun

dbraun@trca.on.ca

Subject: RFP – Energy Leaders Consortium Facilitation

Proposal Format:

Submit a proposal that fully and concisely details the proposal of the respondent.

Provide a flat rate price for the delivery of 6 consortium sessions, including the facilitation and training deliver. Provide per-unit price for each organization participating in the consortium.

Unnecessarily elaborate brochures, artwork, bindings, expensive paper or other materials beyond a complete and effective submission are not required.

All provisions in Respondent's proposal, including any estimated or projected costs, shall remain valid for 90 days following the deadline date for submissions or, if a proposal is accepted, throughout the entire term of the contract.

All proposals become the property of the TRCA upon receipt and will not be returned. Any information deemed to be confidential by Respondent should be clearly noted on the page(s) where confidential information is contained.

Any cost or expense incurred by the Respondent that is associated with the preparation of the Proposal, if any, or during any phase of the selection process, shall be borne solely by Respondent.

IV. EVALUATION CRITERIA

TRCA will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. Members of the Partners in Project Green – Building Performance Team will evaluate the Proposals received in response to this RFP.

Each Proposal will be analyzed to determine overall responsiveness and qualifications under the RFP. Criteria to be evaluated may include the items listed below. The selection committee may select all, some or none of the Respondents for interviews. If TRCA elects to conduct interviews, Respondents may be interviewed and re-scored based upon the same criteria, or other criteria to be determined by the Green Jobs Team. The TRCA may also request additional information from Respondents at any time prior to final approval of a selected Respondent. The TRCA reserves the right to select one, or more, or none of the Respondents to provide services.

Final approval of a selected Respondent is subject to the action of TRCA Board of Directors.

Evaluation criteria:

- A. Experience, Background, Qualifications (35%)
- B. Proposed Plan (35%)
- C. Price (30%)

V. AWARD OF CONTRACT

TRCA reserves the right to award one, more than one or no contract(s) in response to this RFP. The Contract, if awarded, will be awarded to the Respondent whose Proposal is deemed most advantageous to TRCA and Partners in Project Green, as determined by the evaluators, upon approval of the TRCA Board of Directors.

TRCA may accept any Proposal in whole or in part. If subsequent negotiations are conducted, they shall not constitute a rejection or alternate RFP on the part of TRCA. However, final selection of a Respondent is subject to TRCA Board of Directors approval.

TRCA reserves the right to accept one or more proposals or reject any or all proposals received response to this RFP, and to waive informalities and irregularities in the proposals received. TRCA also reserves the right to terminate this RFP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFP process.

No work shall commence until TRCA signs the contract document and the Respondent provides the necessary evidence of insurance as required in this RFP and the Contract.

In the event the parties cannot negotiate and execute a contract within the time specified, TRCA reserves the right to terminate negotiations with the selected Respondent and commence negotiations with another Respondent.

This RFP does not commit TRCA to enter into a Contract, award any services related to this RFP, nor does it obligate TRCA to pay any costs incurred in preparation or submission of a proposal or in anticipation of a contract.

If selected, the Respondent will be required to comply with the Insurance and Indemnification Requirements established herein.

VI. SCHEDULE OF EVENTS

The following is a list of the projected dates and times with respect to this RFP:

RFP Issue Date	-	August 29, 2011
Last Day for Questions	-	September 14, 2011
Proposals Due	-	September 21, 2011
Respondent Interviews	-	October 2011
Respondent Selection	-	October 2011
Work Commence	-	November 2011
Work Complete	-	November 2012