

## Request for Qualifications

### ERA External Reviewer Database

## 1 Instructions

- Read this document carefully before you begin your application.
- Complete all fields in the application form. All questions are mandatory.
- Keep answers as concise as possible.
- Submit only one response per applicant. Submitting multiple applications may lead to your responses not being considered.
- Each response will be evaluated separately against the requirements outlined below.

## 2 Introduction

Emissions Reduction Alberta (“**ERA**”) was created in 2009 to help deliver on Alberta’s environmental and economic goals by accelerating the development and adoption of innovative technology solutions. To achieve this, ERA is investing in a diverse portfolio of transformative, sustainable technologies that reduce greenhouse gas emissions, position Alberta for success in a lower carbon economy, and help innovators address barriers to commercialization.

Proposals submitted to ERA for funding are evaluated through a rigorous two-stage process during which they are reviewed by a team of experts with a breadth of knowledge in the areas of science, engineering, business development, commercialization, financing, and greenhouse gas quantification. The review process uses a transparent set of criteria to evaluate the strengths and potential for outcomes of each proposal. External reviewers, who may be independent contractors or representatives of other organizations, are typically enlisted to help evaluate funding proposals.

## 3 Purpose

ERA is seeking to expand its roster of expert reviewers by establishing a list of individuals with strong qualifications and expertise in the areas outlined Section 8. ERA is creating an external reviewer database (“**External Reviewer Database**”) that will be used as one of multiple resources from which ERA can select expert reviewers. ERA is therefore calling on interested parties with relevant expertise to complete an application through this Request for Qualifications (“**RFQ**”) to be considered for future expert review contracts (“**Contracts**”). Applications received will be reviewed for compliance with the requirements stated in Section 6 and for overall quality. ERA intends to maintain and continually update the External Reviewer Database by accepting responses on an ongoing basis. ERA also intends to source reviewers from the External Reviewer Database depending on the needs of ongoing proposal evaluation processes.

**NOTE: Placement on the External Reviewer Database does not guarantee that any party will be selected to participate in ERA's review process or that any work will be awarded.**

## 4 Procedure

ERA's process for compilation and use of the External Reviewer Database is as follows:

1. ERA opens the application process for the External Reviewer Database October 13, 2020.
2. Applications will be accepted on an ongoing basis until October 13, 2022 or until such time as ERA deems that the list is sufficiently populated.
3. Applicants who meet the minimum requirement, and whose credentials and expertise align with ERA's needs, in ERA's sole discretion, may be added to the External Reviewer Database. No notification will be provided regarding placement on the External Reviewer Database.  
**Inquiries to ERA regarding the status of an application will not be responded to.**
4. ERA will conduct periodic reviews on an as-needed basis to categorize the expertise of each reviewer on the External Reviewer Database and to assess the alignment of the reviewer's experience with current and upcoming ERA programs.
5. Based on the needs of each ERA funding initiative, ERA will assemble an expert review team from various sources, including but not limited to the External Reviewer Database, as deemed necessary by ERA in its sole discretion.
6. Reviewers selected from the External Reviewer Database will be subjected to additional orientation, conflict of interest screening, and contracting prior to review engagement. Applicants that have been selected will be notified prior to the beginning of the review period.

## 5 Services

The scope of work for each reviewer selected from the External Reviewer Database will be negotiated during contracting following selection of the reviewers by ERA. However, the generic services to be provided by each reviewer include but are not limited to:

- participating in a reviewer orientation webinar to become familiar with the program criteria and review process;
- reading and evaluating one or more proposals according to the criteria set out by ERA in the evaluation documents, as well as any other criteria or principles provided to the reviewer by ERA during the process;
- providing numeric scores and commentary for the project(s) using the evaluation document(s) provided by ERA; and
- participating in various group activities such as review meetings, applicant presentations, and deliberations.

Timelines, review assignment, and deadlines will be established by ERA during contracting with each reviewer. In the event of any discrepancy between this RFQ and the reviewer's Contract scope of work, the Contract shall govern.

## 6 Requirements and Qualifications

To be considered for ERA's External Reviewer Database, an applicant must meet the following minimum requirements:

- experience and expertise in at least one of the areas of focus listed in Section 8;
- a degree (graduate-level preferred) in a field related to an area of focus listed in Section 8 from an accredited post secondary institution;
- the ability to travel to Edmonton and/or Calgary, where requested, to attend in-person components of the review process;
- the ability to participate in online webinars and virtual meetings, where requested, with full video and audio capabilities; and
- a minimum of five years experience in a relevant role (technology assessment, development, implementation, commercialization).

Furthermore, additional consideration will be given to applicants with the following desirable qualifications:

- familiarity with Alberta's climate change legislation, emissions management policies, energy and energy efficiency policies, and other relevant regulations and legislation; and
- previous experience with project selection, due diligence, technical risk assessment, and public funding processes.

## 7 Response Guidelines

In completing the application form, all applicants must:

- pass the required human verification test;
- answer all questions, providing all the required information;
- highlight their knowledge in the listed areas of interest based on level of expertise (subject matter expert or practical expertise). Any areas that do not represent an applicant's expertise should be left blank; and
- provide a minimum of two work references with contact information.

In the event whereby an applicant's area of expertise aligns with ERA's technology roadmap ("**Technology Roadmap**") but is not found on the Section 8 list, the applicant should select 'Other' from the list and provide a concise description of the area of expertise.

**Note: No additional information or attachments will be accepted.**

## 8 Areas of Focus

External reviewer services are solicited to support initiatives aligned with ERA's mandate and Technology Roadmap (<https://eralberta.ca/about-era/technology-roadmap/>). This spans a wide range of industries and technology areas which include but are not limited to:

- Oil and Gas
  - conventional oil and gas production, extraction, and processing
  - oil sands (mined and/or in-situ)
  - oil sands site remediation and reclamation
  - natural gas midstream processing
  - petrochemicals
  - crude oil refining, upgrading, or partial upgrading
  - unconventional crude oil and gas
  - natural gas pipelines and transportation
- Agriculture, Food, Fibre, Forestry and Bioindustries
  - forestry and forest management
  - forest products (e.g. lumber, pulp, paper)
  - agricultural land and/or water use and remediation
  - soil management
  - agricultural practices (e.g. nutrient management, irrigation)
  - biofuels and bioenergy
  - agricultural waste management
  - natural carbon sinks
- Low Carbon Electricity
  - conventional electricity generation, transmission, distribution, and storage
  - geothermal energy
  - renewable energy (e.g. wind, solar, hydropower)
  - energy storage
- Industrial Products and Processes
  - green materials
  - sustainable transportation
  - industrial energy efficiency
  - low grade heat utilization
  - low carbon buildings and infrastructure
  - advanced materials and manufacturing
  - fuel switching and electrification
- Cross-Cutting
  - digitization and automation,
  - machine learning and artificial intelligence
  - carbon capture, utilization, and storage

- hydrogen and synthetic fuels
- technology research and development
- environmental impact analysis
- energy systems analysis
- lifecycle analysis and GHG quantification
- Research, Business and Policy
  - commercialization and business development
  - investment and venture capital
  - business case/ financial analysis
  - technoeconomic analysis
  - project management and execution

## 9 Terms and Conditions

### 9.1 General Application Process

ERA reserves the right to:

- review applications at any time if required;
- discontinue this RFQ at any time;
- re-evaluate and amend the requirements for the External Reviewer Database as outlined in this RFQ;
- issue a new RFQ for ERA's External Reviewer Database at any time;
- not disclose the applicant's evaluation information to any party, the applicant inclusive;
- interview applicants, contact provided references, and/or request a security clearance check to assess suitability for a project;
- refuse the services of an applicant should the evaluation, reference checks, and/or security clearance check be unfavorable in the opinion of ERA, acting reasonably;
- reject any or all applications when it is in the best interest of ERA;
- share the External Reviewers Database with Government of Alberta departments, provincial organizations requiring similar services, or other Government of Alberta/Canada trusted funding partners of ERA, including but not limited to Alberta Innovates, Sustainable Development Technology Canada, Natural Resources Canada, and others;
- invite applicants to perform services described in this RFQ for Government of Alberta departments, provincial organizations requiring similar services, or other Government of Alberta/Canada trusted funding partners of ERA, including but not limited to Alberta Innovates, Sustainable Development Technology Canada, Natural Resources Canada, and others;
- request that an applicant review alignment of a project with ERA's mandate as a preliminary check before the proposal enters ERA's 2-stage evaluation process; and

- source for external reviewers outside of the External Reviewers Database developed from this application.

Furthermore:

- any external reviewer may, at the sole discretion of ERA, lose their qualification status for unsatisfactory performance and/or misrepresentation of expertise;
- any Contract(s) awarded after this RFQ shall be subject to an Appointment and Non-Disclosure Agreement and will be subject to the terms and conditions described in this guideline document. Therefore, applicants selected for Contracts must agree to sign ERA's standard Appointment and Non-Disclosure Agreement on an as needed basis;
- if, in the sole opinion of ERA, it appears that the Contract with any preferred applicant cannot be executed within 14 days, negotiations with another applicant may be undertaken;
- placement on the External Reviewers Database does not guarantee that the applicant will receive an invitation for a detailed evaluation or a Contract from ERA, nor does it imply that the applicant has any type of contractual or employment relationship with ERA either now or in the future;
- ERA, in its sole discretion, can enter in contracts with other reviewers for the performance of any of the services outlined in this RFQ by any other means outside of this RFQ; and
- participation in this application does not affect an applicant from participating in other activities of ERA.

## 9.2 Confidentiality

ERA is subject to the *Freedom of Information and Protection of Privacy Act*, RSA 2000, c.F-25 while performing duties and functions and exercising powers delegated to it. The *Freedom of Information and Protection of Privacy Act* may apply to all information and records provided by the applicant to ERA and to any information records which are in the custody or under the control of ERA.

Subject to the requirements described above, ERA is governed by a comprehensive Privacy, Data Security and Confidentiality Policy (the "**Policy**"). The Policy requires that any and all information concerning the business affairs of ERA and its directors, officers, employees and applicants is to be kept private, secure and confidential. Confidential information that is collected, used, or disclosed by ERA will be handled in a manner that recognizes both the right of the individual to have his or her confidential information protected and the need of ERA to collect, use and disclose such information for purposes that are reasonable. Applicants are encouraged to identify those portions of their submissions that are confidential which, if revealed, would harm their business interests.

To read the entire Policy, visit <http://eralberta.ca/privacy>. Information regarding the *Freedom of Information and Protection of Privacy Act* is available at <http://foip.alberta.ca>.

### 9.3 Data Storage and Security

Applicants who are offered a Contract may be required to meet all or part of the following requirements:

- data will be stored on a secure Canadian owned server in Alberta or, if necessary, on a secure Canadian owned server within Canada. Data will not be transported outside of Canada. Data transmitted or stored on computers, portable devices or other media must be password protected and encrypted using secure procedures. The applicants will provide ERA, upon request, details describing their plan for meeting the data storage and security requirements, prior to entering a Contract; and
- when the Contract ends, whether through expiry or termination, the contracted external reviewer will provide all data to ERA in a method to be determined at the time of Contract end, and the contracted external reviewers will be required to delete all data from any computers, servers, portable devices or media under their control.

### 9.4 Computers, Software, Parking, Secretarial Services, Travel, Expenses, and Insurance

Applicants who enter Contracts with ERA:

- will provide their own office space, equipment, computers, software, telephone, and videoconferencing capabilities as required, as well as other tools necessary for the purpose of performing the services. Amenities, including but not limited to secretarial services and parking, will not be provided by ERA. On-site equipment, computers, software, telephone, and photocopy facilities may be available for use when the work requires face-to-face collaboration at an ERA office location;
- may be required to travel to meet contractual requirements and may be expected to attend occasional project meetings at their own expense;
- must submit expense invoices to be reimbursed for approved expenses incurred while delivering the services. Documentation, claims, and reimbursement of expenses shall be conducted as per the standard ERA reimbursement policy which will be attached to the reviewer Contract; and
- are required, at their own expense, to obtain insurance under a contract of general liability insurance in accordance with the *Insurance Act*, RSA 2000, c I-3 in an amount not less than \$2,000,000 inclusive per occurrence insuring against bodily injury, personal injury and property damage including loss of use thereof. Such insurance shall include blanket contractual liability. Evidence of such insurance in a format acceptable to ERA shall be made available at ERA's request, as a condition of any Contract(s).

## **9.5 Reporting**

External reviewers who enter Contracts will be required to submit various reports and deliverables as negotiated with ERA and as outlined in the Contract.

## **9.6 Lobbyists Act**

The *Lobbyists Act*, SA 2007, c L-20.5 prohibits paid lobbyists from holding contracts with the Government of Alberta to provide paid advice on the same subject matter for which they are also a paid lobbyist. Any Contract awarded pursuant to this application may be subject to the *Lobbyists Act*.

Applicants considered for Contracts may be requested to provide information relating to any lobbyist activities with which they may be involved prior to a contract being awarded. Vendors are therefore encouraged to review the *Lobbyists Act* at: <http://www.lobbyistsact.ab.ca>.

## **9.7 Copyright**

Copyright in deliverables produced in accordance with a Contract shall belong to ERA unless otherwise negotiated. The external reviewer will also waive all moral rights to the deliverables.

## **9.8 Conflict of Interest**

Nothing in this RFQ process is intended to prevent reviewers from competing for project funds from various granting bodies. All ERA reviewers will be subjected to a detailed conflict of interest policy. External reviewers with any real or perceived conflict of interest with an applicant to any ERA program will not be eligible to conduct reviews for that project. ERA will not allow an external reviewer with any real or perceived conflict of interest to evaluate proposals from a competition to which the party has applied for grant funding.

## **9.9 Contract**

Applications submitted shall form part of the Contract. In the case of conflicts of interest, discrepancies, errors, or omissions, the documents, and amendments to them shall take precedence and govern in the following order: Contract, application.

## **9.10 Irrevocability of Responses**

All responses submitted through this RFQ are irrevocable. Applicants may request to amend an application by sending a written request to ERA.

### **9.11 Vendor Expenses**

The applicant is responsible for all costs incurred in applying, attending an interview if applicable, and for subsequent negotiations, if any, with ERA.

### **9.12 Response Returns**

Responses and accompanying documentation submitted by applicants are the property of ERA and will not be returned.

### **9.13 Indemnity and Limitation of Liability**

ERA (and its officers, directors, members, employees and representatives) shall not be liable or responsible for any demands, liability, claim, costs, expenses, bodily or personal injury or property damage of any nature whatsoever that may be suffered or sustained by the applicant, its employees, agents, contractors or sub-contractors in carrying out activities relating to this application and the performance of the services or these terms and conditions.

Each applicant shall indemnify and hold harmless ERA (and its officers, directors, members, employees and representatives), from any and all claims, demands, actions and costs whatsoever that may arise directly or indirectly out of any act or omission of the applicant, its employees or agents, contractors or sub-contractors, in the performance of the services or these terms and conditions. Such indemnification shall survive termination of these terms and conditions and completion of the services.

## **10 Further Information or Inquiry**

For questions regarding ERA's mandate, processes, policies, or the specifics of this application, prospective applicants are encouraged to contact Aaron Baugh ([abaugh@eralberta.ca](mailto:abaugh@eralberta.ca)) or Christophe Owtrim ([cowtrim@eralberta.ca](mailto:cowtrim@eralberta.ca)).

**Note: Verbal responses to enquiries are not binding on any party.**

## **11 Application Form**

By filling out and submitting an application form, you confirm that you have read, understood, and agree to the application guidelines and the terms and conditions set out in this RFQ.

**[CLICK TO ACCESS APPLICATION FORM](#)**