Request for Qualifications

Emissions Reduction Alberta – Project Advisor

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.

Each project selected for funding is assigned a Project Advisor (PA). The role of the Project Advisor is to support and guide the funding recipients throughout the project lifecycle, from funding notification to project completion. This includes reviewing and providing relevant feedback on project workplans, budgets and other deliverables required before recipients enter a legal agreement with ERA, guiding recipients through ERA's change management processes, reviewing and approving deliverables to process financial claims, serving on project steering committees, reviewing and approving content of final outcomes reports, and ensuring all technical submissions meet the requirements of ERA.

3 Purpose

Transparency, integrity, accountability, and performance are key to the success of all ERA programs. To ensure that all projects selected for funding by ERA receive adequate support, ERA intends to employ the services of Project Advisors who focus on ensuring recipients meet all obligations outlined in their legal agreements.

ERA intends to enter into agreements with multiple Project Advisor service providers simultaneously to ensure that sufficient capacity is available for all of ERA's project activities throughout the year. Specific Project Advisor engagements will be assigned by ERA on a per-project basis.

ERA is seeking to expand its roster of project advisors by establishing a list of qualified individuals. ERA is creating a Project Advisor database ("**Project Advisor Database**") that will be used as a resource from which ERA can select project advisors. 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 project advisor 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 Project Advisor Database by accepting responses on an ongoing basis.

The Project Advisor Database may be populated with *individuals* or *organizations* that provide these services. As such, each submission to this RFQ should clarify if they are applying as an *individual* or on behalf of an *organization*. If you are submitting on behalf of an organization, ERA may request additional information on the list of qualified individuals seeking to become a project advisor.

NOTE: Placement on the Project Advisor Database does not guarantee that any party will be selected to participate in ERA's project advising process or that any work will be awarded.

4 Procedure

ERA's process for compilation of the Project Advisor Database is as follows:

1. ERA opens the application process for the Project Advisor Database (January 2025)
2. Applications will be accepted on an ongoing basis 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 contacted for additional information to enable their placement on the Project Advisor Database. Successful applicants will be notified regarding placement on the Project Advisor Database. **ERA will not respond to inquiries regarding the status of applications to this RFQ or placement within the Project Advisor Database.**

From time to time, on an as-needed basis, ERA will use the Project Advisor Database to source project advisors for ERA-funded projects according to the following process:

1. Project Advisors selected from the Project Advisor Database will be contacted by ERA to confirm availability and willingness to participate. At the time of contact, project details, timelines, and expected workload will be communicated.
2. Selected project advisors will be subject to additional orientation, conflict of interest screening, and contracting prior to review process engagement. All project advisors must enter into a consulting services contract with ERA prior to being assigned projects.

5 Services

The following scope of work is a breakdown of tasks expected for Project Advisor engagement for a given project:

- Reviewing ERA's current policies, templates and other process-related documents and guidelines to become familiar with the ERA process;
- Attending and observing project advising activities throughout the course of the project, such as (but not limited to): project steering committee or project update meetings, project advisor training workshops and/or webinars;
- Providing ongoing support and guidance to funding recipients throughout the project lifecycle, from the contracting process with ERA, project monitoring and project completion activities;
- Providing input and feedback, as required, to funding recipients on technical project deliverables such as (but not limited to): workplans, progress reports, final outcomes reports and commercialization and technology transfer plans to ensure deliverables meet ERAs quality standards for delivery;
- Provide input and feedback, as required, to funding recipients on financial claim process such as (but not limited to): validating variances between budget and actuals to ensure they meet ERA's change management thresholds, validating that expenses are aligned with ERA's Eligible Expense Guidelines

Timelines and deadlines will be established by ERA with each project advisor prior to engagement in a given project. In the event of any discrepancy between this RFQ and the project advisors Contract scope of work, the Contract shall govern.

Invoices should be provided to ERA's financial team at the end of each month where work is performed, and should indicate clearly the project name for which they were engaged.

The following list indicates specific, important aspects of the role:

- The Project Advisor represents ERA's interests and ensures funding recipients meet ERA's requirements;
- The Project Advisor reports to ERA's Director, Portfolio Management.
    - For day-to-day matters the project advisor will interact with ERA's portfolio team

6 Requirements and Qualifications

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

1. **Relevant Experience and Expertise**

- Post-Secondary Degree in science or engineering
- 10+ years of demonstrated professional experience in managing or coordinating projects
- Experience in reviewing and providing relevant feedback on technical reports
- Experience in monitoring and managing budgets
- Familiarity with research funding, procurement, or grant programs is preferred.
- Experience with managing technology innovation projects is preferred
- PMP designation is preferred
- Skills in Financial Analysis or financial designation (interpreting income statements, balance sheets, annual reports) is considered an asset.

2. **Communication and Advisory Skills**

- Strong interpersonal and advisory skills to provide clear, constructive guidance to funding recipients.
- Ability to respectively navigate difficult conversations, advocating for ERA's position, while ensuring funding recipients receive support they need.
- Ability to communicate collaboratively and collegially with stakeholders, while holding accountability to high standards of deliverables
- Strong ability to distill complex technical concepts into simplified plain language summaries
- Outstanding written and verbal communication skills

3. **Record-Keeping and Reporting**

- Capable of tracking, documenting, and reporting status of projects leveraging ERA's tools and templates
- Strong digital literacy. Experience using grant management, project management or financial software
- Experience with SharePoint is preferred

4. **Availability, Discretion and Professionalism**

- Must be able to handle sensitive information with discretion and maintain high standards of confidentiality and professionalism.
- Must be available to assist funding recipients during normal business hours and available to support a project workload of a minimum of 10-15 hours per week.

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 is preferred.

7 Response Guidelines

In completing the application form, all applicants must:

- accept the declaration to provide only information that is accurate and correct;
- answer all questions fully;
- provide a recent copy of their resume; and
- provide a minimum of two work references, with contact information.

Applicants are encouraged to review ERA's Technology Roadmap and Business Plan prior to submitting their response to this RFQ.

Resumes must be submitted by email to ERA. **An email address and further instructions for resume submission will be provided upon completion of the RFQ form.** Resumes submitted without completion of the RFQ form will not be accepted. Cover letters are not required.

8 Terms and Conditions

8.1 General Application Process

ERA reserves the right to, at any time and without notice:

- review applications;
- amend or discontinue this RFQ;
- re-evaluate and amend the requirements for the Project Advisor Database as outlined in this RFQ;
- issue a new RFQ for ERA's Project Advisor Database;
- interview applicants, contact provided references, and/or request a security clearance check to assess suitability;
- refuse the services of an applicant should the evaluation, reference checks, and/or security clearance check be unfavorable in ERA's opinion;
- source project advisors from outside of the Project Advisor Database developed from this application.

Furthermore:

- any project advisors 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 include, among other things, non-disclosure and confidentiality requirements. As such, applicants approved as project advisors, and selected for Contracts, must enter into a consulting services agreement with ERA to provide project advisor services that is acceptable to ERA in its sole discretion;
- 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 Project Advisor Database does not guarantee that the applicant will receive an invitation for 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 will not disclose the applicant's information or ERA's evaluation thereof to any party, including with the applicant;
- ERA, in its sole discretion, can enter in contracts with other project advisors for the performance of any of the services outlined in this RFQ, including by any other means outside of this RFQ; and
- participation in this application does not preclude an applicant from participating in other activities of ERA.

8.2 Confidentiality

ERA is subject to the *Access to Information Act*, c.A-1.4, while performing duties and functions and exercising powers delegated to it. The *Access to Information 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 eralberta.ca/privacy.

Information regarding the *Access to Information Act* is available at alberta.ca/access-to-information-act.

8.3 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 project advisor will provide all data to ERA in a method to be determined at the time of Contract end, and the contracted project advisors will be required to delete all data from any computers, servers, portable devices or media under their control.

8.4 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 fairness monitor Contract;
- 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);
- are required, at their own expense, to obtain and maintain professional liability insurance in an amount not less than $1,000,000 per claim and $2,000,000 in the aggregate; and
- are required, at their own expense, to obtain and maintain cyber liability insurance protecting and indemnifying ERA and the Contractor and their respective directors, officers, servants, agents, invitees, and employees against any claims for damage or injury to person or property, with limits of not less than $2,000,000.00 inclusive of any one loss. Such insurance shall contain a "cross liability" or "severability of interests" clause such that ERA and the Contractor and their respective directors, officers, servants, agents, invitees and employees shall be insured in the same manner and to the same extent as if individual policies had been issued to each. Such insurance shall include, *inter alia*, coverage for data breaches and notification expenses.

8.5 Reporting

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

8.6 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: open.alberta.ca/publications/l20p5.

8.7 Copyright

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

8.8 Conflict of Interest

Nothing in this RFQ process is intended to prevent project advisors from competing for project funds from various granting bodies. All ERA project advisors will be subjected to a detailed conflict of interest policy. Project Advisors with any real or perceived conflict of interest with an applicant to any ERA program will not be eligible to conduct project advising for that program. ERA will not allow a Project Advisor with any real or perceived conflict of interest to advise on a project.

8.9 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.

8.10 Applicant Expenses

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

8.11 Response Returns

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

8.12 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.

9 Further Information or Inquiry

For questions regarding ERA's mandate, processes, policies, or the specifics of this application, prospective applicants are encouraged to contact ERA through hr@eralberta.ca

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

10 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 HERE TO FILL THE APPLICATION FORM