



REQUEST FOR PROPOSAL (RFP)
Grant Funding Management Platform

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ARTICLE 1 - KEY RFP DETAILS

1.1 Key Terms of the RFP

RFP Title	Emissions Reduction Alberta (“ERA”) Grant Funding Management Platform
RFP Manager	Christine Irwin cirwin@eralberta.ca
Contract Term	Implementation phase (target 6 months or less), followed by an initial subscription and support term of five (5) years from Go-live Acceptance, with up to three (3) additional one-year renewal periods at ERA's sole discretion

1.2 RFP Milestones and Timing

RFP Issue Date	October 27, 2026
Notice of intent to submit (by email to the RFP Manager)	November 2, 2026
Deadline for Questions	16:00 Mountain Time (Alberta) on November 10, 2026
Final Responses to Questions	November 16, 2026
Closing Date	16:00 Mountain Time (Alberta) on November 27, 2026
Notification of acceptance to Stage III	December 18, 2026
Final Round Stage III Demonstrations (virtual or in person)	Between January 6 and January 20, 2027
Selection of Successful Proponent	February 2027
Target for Contract Award	March 2027

ARTICLE 2 – DEFINITIONS

2.1 Defined Terms

In this RFP, the following terms will have the meanings set out below:

“Addendum” or **“Addenda”** means, as the case may be, any one or more written supplements, modifications, clarifications or additions to this RFP as issued by ERA.

“Agreement” means the written contract to be entered into by the successful Proponent with ERA for the performance of the Scope of Work, consisting of the Proponent’s SaaS Agreement, as negotiated, and the ERA Contractual Requirements set out in Appendix C, as described in Sections 3.3 and 8.2.

“ATIA” means Alberta’s *Access to Information Act*, SA 2024, c A-1.4, as amended or replaced from time to time.

“Closing Date” means the date and time by which a Proposal must be submitted in accordance with this RFP, as set out in Section 1.2.

“Deadline for Questions” means the date and time by which Proponent questions or requests for clarification must be submitted under this RFP, as set out in Section 1.2.

“Emissions Reduction Alberta” or **“ERA”** means Climate Change and Emissions Management (CCEMC) Corporation, operating under the registered trade name Emissions Reduction Alberta. References in this RFP to “ERA” include its officers, directors, employees, agents and authorized representatives, as applicable.

“ERA Personnel” means the directors, officers, employees, and advisers of ERA and of the Fuel Innovation Fund Corporation.

“ERA Information” means all data, records, documents and information, including personal information, provided by or on behalf of ERA, the Fuel Innovation Fund Corporation, applicants or other users to the Proponent, or created, collected, stored or processed through the Services, including AI-generated outputs, metadata and logs.

“Evaluation Criteria” means the criteria and weighting applicable to the evaluation of Proposals submitted pursuant to this RFP, as set out in Appendix B.

“Exceptions Statement” means the completed exceptions statement in the form attached as Schedule D submitted by the Proponent as part of its Proposal.

“Go-live Acceptance” means ERA’s written confirmation that the Grant Funding Management Platform, or the core intake and review functions under an approved phased plan, is in production use and meets the acceptance criteria agreed in the implementation plan, including successful user acceptance testing, reconciled data migration and working integrations.

“POPA” means Alberta’s *Protection of Privacy Act*, SA 2024, c P-28.5, as amended or replaced from time to time.

“Proponent” means a person (including an individual, firm, corporation, or other legal entity) providing or submitting a Proposal in response to this RFP.

“Proposal” means a proposal or submission in response to this RFP, consisting of those materials and information contained in or required by the Schedules to this RFP.

“RFP” means this Request for Proposal, as it may be modified, amended or supplemented from time to time, including any attached Schedules and Appendices and any Addenda issued in connection herewith.

“RFP Manager” means the individual(s) authorized by ERA to administer this RFP and to answer questions and requests for clarification, as identified in Section 1.1.

“Scope of Work” means the work to be performed and the goods, services and/or deliverables to be provided under the Agreement, as more fully described in Appendix A.

“Services” means the subscription, hosting, implementation, support and other services and deliverables to be provided under the Scope of Work.

2.2 Interpretation

References herein to an Article, Section, subsection, Schedule or Appendix are references to an Article, Section, subsection, Schedule or Appendix in this RFP, unless otherwise noted.

ARTICLE 3 – INTRODUCTION

3.1 About ERA

ERA is a registered tradename of the Climate Change and Emissions Management (CCEMC) Corporation. ERA was established as a key partner of the Government of Alberta to address Alberta's Climate Leadership priorities. ERA has a mandate to identify and accelerate innovative solutions that secure Alberta's success in a lower carbon economy. By supporting the next generation of clean technology, ERA helps Alberta build an open, sustainable, and increasingly diversified economy that attracts investment, facilitates diversification, expands market access, and delivers improved environmental outcomes.

ERA also administers the Fuel Innovation Fund through its wholly owned subsidiary, Fuel Innovation Fund Corporation (FIFC). FIFC is a federally incorporated not-for-profit corporation established to administer the Fuel Innovation Fund as a registered Emission Reduction Funding Program under Canada's Clean Fuel Regulations. The Fuel Innovation Fund reinvests federal compliance contributions from industry into Canadian projects that deliver measurable emissions reductions, strengthen industrial competitiveness, and accelerate clean-fuel technology innovation. The Grant Funding Management Platform procured through this RFP is intended to support ERA's funding programs, including programs administered on behalf of FIFC, while maintaining appropriate distinctions between entities, programs, data, workflows, access permissions, and reporting requirements.

More information about ERA can be found on our website: www.eralberta.ca

3.2 Invitation to Proponents

This RFP is an invitation to qualified vendors to provide, configure, implement, and support a cloud-based Grant Funding Management Platform that supports the complete lifecycle of ERA's funding programs.

The solution will replace ERA's existing grant management system and provide a secure, configurable, and scalable platform for funding opportunity management, application intake, project administration, milestone claims processing, payment administration, reporting, and records management. The platform must support ERA's funding processes from Expression of Interest (EOI) through Full Project Proposal (FPP), Project Plan contracting, project execution, financial administration, and project close-out.

ERA welcomes innovative approaches, including alternative delivery models, phased implementation and AI capabilities beyond those described. Proponents may propose alternative ways of meeting Appendix B requirements, provided the intended outcome and the Appendix C, Part A requirements are met. Optional

innovations should be priced separately in Schedule A. Proposals may be submitted by a single vendor or by a Proponent working with subcontractors or partners, for example a platform provider and an implementation firm. The Proponent will be the contracting party and is responsible for all Services, including those delivered by its subcontractors or partners. A platform provider or subcontractor may be named in more than one Proposal, but each Proponent may submit only one Proposal. Key subcontractors or partners named in a Proposal may not be replaced after the Closing Date without ERA's written consent.

AI-assisted review and administration

A key objective of this procurement is to improve the efficiency, consistency and quality of ERA's application review and program administration through the responsible use of artificial intelligence ("AI"). ERA is seeking a platform with AI capabilities that assist ERA personnel across the funding lifecycle, for example: completeness and eligibility screening of applications; summarizing proposals and supporting documents; comparing submissions against program criteria; searching program records; flagging unusual claims, budget variances or reporting gaps; and drafting routine correspondence and reports.

AI functionality must support, not replace, the judgment of ERA personnel. ERA's minimum contractual requirements for AI, including human review of funding decisions, restrictions on model training, ERA control of AI features, and AI safeguards and data residency, are set out in Appendix C. AI capabilities will be evaluated under Appendix B, Criterion 1, Outcome 1G (Responsible, AI-assisted administration).

3.3 Form of Agreement

As part of its Proposal, each Proponent must provide the standard form of software-as-a-service agreement (the "SaaS Agreement") proposed to govern the provision, configuration, implementation, hosting, support and ongoing operation of the Grant Funding Management Platform. ERA is not providing a standard form of service provider agreement as part of this RFP.

The successful Proponent's SaaS Agreement will form the basis of the Agreement, subject to the ERA Contractual Requirements set out in Appendix C and the contracting and negotiation process described in Article 8. Proponents must identify any permitted exceptions to Appendix C in accordance with Schedule D.

3.4 No Guarantee of Volume of Work or Exclusivity of Contract

ERA makes no guarantee of the value or volume of work to be assigned to the successful Proponent, whether in relation to the Scope of Work or otherwise. The Agreement with the successful Proponent may not be an exclusive agreement for the provision of the Scope of Work. ERA expressly reserves the right to contract with others for deliverables, goods and services or work the same as or similar to the Scope of Work contemplated under this RFP.

ARTICLE 4– GENERAL INFORMATION AND INSTRUCTIONS

4.1 Proponents to Review RFP and Follow Instructions

Proponents should structure their Proposals in accordance with this RFP and reference the applicable Section, Appendix or Schedule in their responses. Proponents must promptly review the RFP and report any errors, omissions, conflicts or ambiguities in writing to the RFP Manager before the Deadline for Questions. ERA is not responsible for any misunderstanding of the RFP on the part of a Proponent.

4.2 Proponents Bear Their Own Costs

Each Proponent bears all costs of preparing and submitting its Proposal and of participating in demonstrations, verification and negotiations.

4.3 Information in RFP Only an Estimate

Quantities and data in this RFP, including the volumes in Appendix A, are estimates based on historical information and are provided only to indicate the general size and scale of the Scope of Work. ERA makes no representation as to their accuracy. Information that is not included or referred to in this RFP does not form part of it.

4.4 Integrity of the Procurement Process

A Proponent must not seek or use confidential information or improper influence in connection with this RFP. A Proponent must promptly notify the RFP Manager if anyone offers it such information or influence.

ARTICLE 5– COMMUNICATION AFTER RFP ISSUANCE

5.1 Questions and Clarifications

All questions about this RFP must be submitted by email to the RFP Manager before the Deadline for Questions. Contact with anyone at ERA other than the RFP Manager, except as permitted by this RFP, may result in disqualification. ERA will share all questions and answers with all Proponents without identifying who asked. If a Proponent explains why a question is commercially confidential and ERA agrees, ERA will answer only that Proponent, unless ERA determines that the answer clarifies the RFP for all Proponents. Oral answers are not binding, and only answers issued by Addendum amend the RFP.

5.2 Addenda and Changes to Milestones

ERA may amend this RFP, including the RFP Milestones and Timing in Section 1.2, only by Addendum. Addenda form part of the RFP and will be sent by email to Proponents that have notified the RFP Manager of their intent to submit a Proposal. Proponents are responsible for obtaining all Addenda and must acknowledge them in Schedule C. If an Addendum is issued after the Deadline for Questions, ERA may extend the Closing Date. After the Closing Date, any changes to the milestones will be communicated directly to Proponents that have submitted Proposals. To receive Addenda, Proponents should notify the RFP Manager by email of their intent to submit a Proposal.

ARTICLE 6 – PROPOSAL SUBMISSION INSTRUCTIONS

6.1 Proposal Instructions

(a) **Contents.** Each Proposal must include:

- (i) a written response to each Evaluation Criterion in Appendix B, using the Appendix B headings and numbering, describing how the proposed solution achieves each outcome and identifying any functionality that requires custom development, third-party services or future roadmap delivery;
- (ii) a completed Proponent Response for each requirement in Appendix C, Part A and Part B;
- (iii) the proposed SaaS Agreement, subscription terms, service level agreement and data processing and privacy terms;
- (iv) the subcontractor and subprocessor information required under Appendix C (C-17 and C-18), including any third-party AI model providers that will process ERA Information and the role of each subcontractor or partner;

- (v) Pricing Information in the form of Schedule A, submitted as a separate file, with no pricing information included in any other part of the Proposal;
- (vi) a completed Reference Form (Schedule B), Proposal Signature Form (Schedule C) and Exceptions Statement (Schedule D); and
- (vii) confirmation that the Proponent holds, or will obtain before execution of the Agreement, insurance in the amounts set out in Appendix A or identification of any proposed alternative in Schedule D (C-35).

ERA may contact any references, including those provided in Schedule B.

- (b) **Mandatory items.** Items (ii), (v) and (vi) of Section 6.1(a) are mandatory submission requirements and will be reviewed at Stage I. At Stage I, compliance with Appendix C, Part A – Mandatory Requirements will be assessed on the basis of the Proponent's confirmations, subject to verification under Section 6.1(c). Where an omission is minor or clerical, ERA may, in its sole discretion, allow the Proponent to correct it within a period specified by ERA, in accordance with Section 7.2.
- (c) **Verification.** Before Stage III, or before notice of selection where Stage III is not held, ERA will ask each short-listed Proponent to provide, within five (5) business days of ERA's request, evidence supporting its Proposal. This may include: (i) the most recent SOC 2 Type II report or ISO 27001 certificate covering the proposed platform, or an equivalent independent assurance report acceptable to ERA (C-4), which may be provided subject to a reasonable non-disclosure agreement; (ii) a current accessibility conformance report, such as a VPAT, for the applicant-facing interfaces (C-11); (iii) a certificate of insurance meeting the requirements of Appendix A or any alternative accepted by ERA; (iv) the full text of any terms, policies or other documents incorporated by reference or hyperlink into the documents provided under item (iii) of Section 6.1(a), as they read on the Closing Date; and (v) any other evidence ERA reasonably requires to verify a confirmation made in the Proposal. If a Proponent does not provide the evidence within the time specified, or the evidence does not substantiate a Part A confirmation, ERA may disqualify the Proposal and proceed with the next-ranked Proponent.
- (d) **Format and length.** Proposals must be in English and submitted as text-searchable PDF files (not scanned images), organized in the following order:
 - (i) a cover letter signed by the Proponent's authorized representative;
 - (ii) an executive summary of no more than two (2) pages;
 - (iii) a table of contents;
 - (iv) the response to Appendix B, of no more than twenty (20) pages for Criterion 1 and eight (8) pages each for Criteria 2 to 4;
 - (v) the Appendix C response; and
 - (vi) the documents listed in items (iii), (iv), (vi) and (vii) of Section 6.1(a), which do not count toward the page limits.

Pricing Information must be submitted as a separate file. Content beyond the page limits may not be evaluated. Marketing materials are not required. Any publications or appendices must be referenced from a specific response and identify the relevant pages; ERA is not obliged to review material that is not referenced.

6.2 Proposal Submission

A digital version of the Proponent's Proposal, signed by the Proponent's authorized representative, must be submitted and received via email to the RFP Manager noted in section 1.1. This submission shall be deemed the Proponent's Proposal of record. Proposals will remain valid and available as the basis for evaluation and negotiations for 180 days after the Closing Date and may not be altered except as requested or permitted by ERA under this RFP. The Proponent is solely responsible for delivering its Proposal as required by this RFP on or before the Closing Date. Proponents submitting near the deadline do so at their own risk.

6.3 Closing Date

Proposals must be submitted in the manner set out in Section 6.2 on or before the Closing Date. Proponents may not submit new or revised Proposals after the Closing Date. Any Proposal that is incomplete, conditional, illegible, obscure, late, modified, or which contains additions, reservations or exceptions not called for, or alterations or irregularities of any kind, may be rejected by ERA. However, any such Proposal may also be accepted by ERA in its sole discretion.

6.4 Amendment, Withdrawal and Retention of Proposals

A Proponent may amend or withdraw its Proposal before the Closing Date by the same method used to submit it, clearly identifying any part being replaced. ERA will retain all Proposals and will not return them, including withdrawn Proposals. All terms of this RFP are deemed accepted by each Proponent and incorporated into its Proposal, and each Proponent is deemed to have factored the requirements of Appendices A and C into its pricing.

6.5 Disqualification

A Proposal may be disqualified by ERA and not receive further consideration if:

- (a) the Proposal has failed to meet or has not been submitted in accordance with the instructions and procedural requirements of this RFP;
- (b) the Proponent fails to cooperate in any attempt by ERA to verify information contained in its Proposal submission;
- (c) ERA, in its sole discretion, determines that a Proponent has made an attempt to contact ERA Personnel other than the RFP Manager except as permitted by this RFP;
- (d) ERA, in its sole discretion and at any time during the RFP process, determines that the Proposal contains incomplete, false or misleading information or that a conflict of interest exists; or
- (e) the Proposal meets any grounds for disqualification set out elsewhere in this RFP.

ARTICLE 7 – EVALUATION OF PROPOSALS

7.1 Evaluation by ERA

ERA will select the Proposal that offers the best overall value in accordance with the Evaluation Criteria. ERA may use approved AI tools to support the evaluation, as described in Section 10.3; all evaluation decisions will be made by the evaluation committee.

7.2 Verify, Clarify and Supplement

During the evaluation, ERA may request clarification or further information from one or more Proponents, or verify information with third parties, without being obliged to do the same for all Proponents. Responses accepted by ERA form part of the Proponent's Proposal and, if the Proponent is successful, of the Agreement.

7.3 Stages of Evaluation

An evaluation committee of ERA personnel will evaluate Proposals. Each evaluator will score Proposals individually, and the committee will then agree on consensus scores.

Stage I – Mandatory Requirements. ERA will confirm that each Proposal meets the mandatory submission requirements in Section 6.1(b) and the requirements in Appendix C, Part A, based on the Proponent's confirmations and subject to verification under Section 6.1(c). A Proposal that does not meet a mandatory requirement may be disqualified. An Exceptions Statement does not cure non-compliance with a Part A requirement.

Stage II – Technical and Pricing Evaluation. The committee will score Criteria 1 to 4 in Appendix B. Pricing Information will not be reviewed during the technical evaluation. A Proposal must score at least 60% across Criteria 1 to 4 to proceed, and at least 60% on Criterion 1 (Functional Solution and User Experience), to proceed; Proposals below this threshold will not be evaluated further, regardless of price. ERA will then review the Pricing Information of the remaining Proposals and score Criterion 5. Exceptions to Appendix C, Part B will be considered under Criterion 5, 5C, in accordance with Schedule D. The Stage II score is the sum of the scores for Criteria 1 to 5.

Stage III – Verification, Demonstrations and References. Unless ERA determines otherwise, the three highest-ranked Proponents will be short-listed. Each will be asked to provide the evidence described in Section 6.1(c) and may be invited to demonstrate its solution using the scenarios in Appendix B. ERA may contact references. Following Stage III, the committee may adjust its scores for Criteria 1 to 4 and will document the reasons for any adjustment. Pricing scores will not change except to correct an error. ERA may change the number of Proponents short-listed or may not hold demonstrations where the difference in Stage II scores makes them unnecessary, in which case verification under Section 6.1(c) will still be completed before selection.

Final Ranking. The final score is the Stage II score as adjusted in Stage III. Subject to successful verification and ERA's reserved rights, the Proponent with the highest final score will be invited to negotiate the Agreement under Article 8. If two Proponents have the same final score, the one with the higher Criterion 1 score will be ranked higher. A Proponent whose Criterion 1 score falls below 60% following any Stage III adjustment will not be selected.

7.4 Reservation of Rights

In addition to any other rights set out in this RFP, ERA reserves the right to:

- (a) make public the names of any or all Proponents;
- (b) waive minor discrepancies in a Proposal;
- (c) accept any Proposal in whole or in part, or reject any or all Proposals;
- (d) cancel this RFP at any stage without liability, request resubmissions or issue a new RFP for the same or a similar Scope of Work;

(e) engage the successful Proponent for related additional work, subject to its performance, funding availability and successful negotiation; and

(f) exercise any other rights that may be implied in the circumstances.

ARTICLE 8 – AWARD AND EXECUTION OF AGREEMENT

8.1 Selection of Proponent

Following the evaluation under Section 7.3 and verification under Section 6.1(c), ERA will notify the top-ranked Proponent in writing that it has been selected. Notice of selection is an invitation to negotiate and finalize the Agreement in accordance with this Article 8. It is not an award of contract, and no contract will exist until the Agreement has been executed by both parties, in accordance with Section 11.1.

8.2 Agreement

The Agreement will consist of the Proponent's SaaS Agreement, as negotiated, together with the ERA Contractual Requirements set out in Appendix C, as described in Section 3.3. By submitting a Proposal, each Proponent agrees that, if selected, the Agreement it enters into with ERA will incorporate the requirements in Appendix C. In the event of a conflict, Appendix C will prevail except to the extent ERA expressly agrees in the final executed Agreement to an exception to a Part B requirement identified by the Proponent in Schedule D.

The requirements in Appendix C, Part A – Mandatory Requirements are non-negotiable and may not be the subject of an exception. A Proponent that wishes to take exception to a requirement in Appendix C, Part B – Core Requirements, or whose SaaS Agreement would qualify or limit any Appendix C requirement, must identify the exception in its Exceptions Statement (Schedule D). ERA is not obliged to consider exceptions that are not identified in the Exceptions Statement.

If no exceptions are indicated in the Exceptions Statement, the Proponent will be deemed to have accepted all of the requirements in Appendix C, subject only to the completion of any square-bracketed or underlined information fields.

ERA may revise or update the requirements in Appendix C by Addendum in accordance with Article 5, and may negotiate, discuss or clarify the final terms of the Agreement with the selected Proponent. ERA will not agree to changes that materially alter the Part A – Mandatory Requirements, or to increases to the pricing in the Proponent's Pricing Information for the same scope. If, as a result of negotiations, discussions or clarifications, a Proposal is clarified or amended, the clarified or amended Proposal will constitute the Proponent's Proposal.

8.3 Negotiations

Negotiations are subject to the rules in this Article 8 and do not create a binding offer or contract for either party. ERA will negotiate with one Proponent at a time, in order of ranking. Negotiations may address the terms of the SaaS Agreement, the incorporation of the Appendix C requirements, implementation details and clarification of scope, and may include requests for information to verify or supplement the Proposal. Negotiations will not be used to materially change the Proposal, the Appendix C, Part A – Mandatory Requirements or the pricing in the Proponent's Pricing Information, as set out in Section 8.2. The Proponent must make available representatives with authority to agree to the terms of the Agreement. The content of negotiations will be kept confidential by both parties, subject to the ATIA.

ERA intends to execute the Agreement within forty-five (45) calendar days after the notice of selection, or such other period as ERA may communicate to the Proponent. ERA may extend this period at its sole discretion.

ERA may end negotiations and begin negotiations with the next-ranked Proponent if:

- (a) an Agreement acceptable to ERA is not executed within that period;
- (b) the Proponent does not complete verification under Section 6.1(c);
- (c) the Proponent withdraws its Proposal; or
- (d) the Proponent seeks to change the Part A requirements or its pricing contrary to Section 8.2.

Before negotiating with the next-ranked Proponent, ERA may require it to complete verification under Section 6.1(c). This process may continue until an Agreement is executed, no eligible Proponents remain or ERA cancels the RFP. ERA may ask Proponents to extend the period during which their Proposals remain valid and available as the basis for evaluation and negotiations and may, at any time before the Agreement is executed, reject all Proposals, request resubmissions or cancel the RFP.

8.4 Notification to Other Proponents

Once the Agreement has been executed, ERA will notify all Proponents of the outcome of the procurement process by email. Unsuccessful Proponents may request a debriefing in accordance with Section 9.1. ERA may publicly disclose the name of the successful Proponent and the value of the Agreement, consistent with its reserved rights in Section 7.4 and applicable law.

ARTICLE 9 – DEBRIEFING AND DISPUTES

9.1 Debriefing

A Proponent may request a debriefing by email to the RFP Manager within ten (10) business days after receiving notice of the outcome under Section 8.4. ERA will endeavour to hold the debriefing within thirty (30) days of the request. The debriefing will discuss the strengths and weaknesses of the Proponent's own Proposal against the Evaluation Criteria. ERA will not disclose scores or provide information about, or comparisons with, other Proposals. ERA may decline or cancel a debriefing if the Proponent seeks information about the evaluation from anyone other than the RFP Manager.

9.2 RFP Dispute Process

All RFP award disputes or protests must be submitted in writing to a senior ERA officer, designated by the Chief Executive Officer, who was not involved in the evaluation of Proposals, within 10 business days after a completed debrief session. A debrief under Section 9.1 is required before a dispute may be submitted. Disputes not submitted within this timeframe will not be considered. The designated officer's decision will be final in all disputes directed to ERA. Submitting a dispute does not suspend the execution or performance of the Agreement.

A written dispute must identify the Proponent and this RFP, set out the factual and legal grounds with supporting documents and the resolution sought, and be signed by the Proponent's authorized representative.

ARTICLE 10 – CONFIDENTIALITY AND PRIVACY

10.1 Conflict of Interest and Communication

Each Proponent must disclose any actual or potential conflict of interest in Schedule C. A Proponent that does not comply with this Section may be disqualified under Section 6.5.

A Proponent may not, at any time, directly or indirectly communicate with the media, make any public announcement, issue any news release, post on social media or identify ERA as a client in marketing materials in relation to this RFP or any Agreement awarded pursuant to this RFP without first obtaining the written permission of ERA.

10.2 Confidentiality, Access to Information and Privacy

(a) **Retention and use.** ERA will retain all Proposals. Retention does not transfer ownership of the Proponent's pre-existing intellectual property. ERA may use and reproduce Proposal materials as reasonably required to evaluate Proposals, complete the procurement, obtain professional advice, maintain its procurement records and comply with applicable law.

(b) **Internal disclosure.** Proposals may be disclosed on a confidential basis to ERA's advisers, ERA's Board of Directors and its committees, and the Fuel Innovation Fund Corporation, as reasonably required to evaluate Proposals and approve the Agreement and may be processed using ERA's approved AI tools as described in Section 10.3.

(c) **Confidential information and the ATIA.** Proposals are subject to the ATIA and POPA, including the right of any person to request access to records in ERA's custody or control, subject to the exceptions in the ATIA. A Proponent should clearly mark the specific information it considers confidential or proprietary. A general marking applied to an entire Proposal may not be relied on. ERA will use reasonable efforts to protect marked information, subject to the ATIA, other applicable law and any order of a court or tribunal having jurisdiction.

(d) **Collection notice.** Personal information in a Proposal, such as information about key personnel and references, is collected under the authority of section 4(c) of POPA to evaluate Proposals and administer this procurement and any resulting Agreement. As described in Section 10.3, it may be used in an automated system to generate content such as summaries. Questions about this collection may be directed to the RFP Manager. This notice is provided for the purposes of section 5(2) of POPA.

10.3 Use of Artificial Intelligence Tools by ERA

ERA may use its approved enterprise artificial intelligence ("AI") tools, currently Microsoft 365 Copilot, to assist the evaluation committee with administrative tasks such as organizing, searching and summarizing Proposal content and comparing it against the Evaluation Criteria. These tools operate within ERA's secure Microsoft 365 environment under terms that do not permit Proposal content to be used to train the provider's AI models. ERA will not enter Proposal content into any publicly available AI tool.

AI tools will not score Proposals, determine whether a Proposal meets a mandatory requirement, or make any evaluation, ranking or selection decision. Evaluators will review each Proposal in full, and AI-generated summaries will not replace that review. All scoring and decisions will be made by members of the evaluation committee, who will verify any AI-generated output against the Proposal before relying on it. ERA's use of AI tools will be consistent with its AI Policy.

Proposal content processed by AI tools remains subject to Section 10.2 and to ERA's obligations under the ATIA and POPA. Proponents should inform individuals whose personal information is included in their Proposal of this use.

By submitting a Proposal, the Proponent acknowledges ERA's use of AI tools as described in this Section.

ARTICLE 11– LIMITATION OF LIABILITY AND GOVERNING LAW

11.1 No Contract A or Contract Until Execution

The procurement process under this RFP is not intended to create and shall not create a formal legally binding bidding process and shall instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation: (a) this RFP shall not give rise to any Contract A-based tendering law duties or other legal obligations arising from a process contract or collateral contract; (b) neither the Proponent nor ERA shall have the right to make any claim, whether in contract, tort or otherwise, against the other with respect to the award of a contract, failure to award a contract or failure to honour a response to this RFP; and (c) no legal relationship or obligation regarding the provision or performance of the Scope of Work will arise between ERA and any Proponent unless and until ERA and the selected Proponent successfully negotiate and execute the Agreement.

11.2 Limitation of Liability

By submitting a Proposal, the Proponent agrees that:

- (a) neither ERA nor any ERA Personnel will be liable, under any circumstances, for any claim arising out of this RFP process, including but not limited to costs of preparation of the Proposal, loss of profits, loss of opportunity or for any other claim; and
- (b) the Proponent waives any claim for any compensation of any kind whatsoever, including claims for cost of preparing the Proposal or participating in presentations, verification or negotiations, loss of profit or loss of opportunity, by reason of ERA's decision to not accept the Proposal submitted by the Proponent, to award a contract to any other Proponent or to cancel this RFP process, and the Proponent shall be deemed to have agreed to waive such right or claim.

This Section applies to the RFP process only. Liability under the Agreement will be as set out in the executed Agreement.

11.3 Governing Law

This RFP is governed by the laws of Alberta and the federal laws of Canada applicable therein. Each Proponent irrevocably submits to the exclusive jurisdiction of the courts of Alberta in respect of any proceeding arising from or relating to this RFP.

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Appendix A – RFP Specifications

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APPENDIX A – RFP SPECIFICATIONS

1.1 Scope of Work

The Scope of Work is described in Section 3.2 and, in more detail, in Appendix B (the outcomes the solution must achieve) and Appendix C (ERA's contractual, security, privacy and AI requirements). In summary, it comprises: (a) subscription to, and hosting and support of, the Grant Funding Management Platform; (b) configuration and implementation, with a target of six months or less to go-live, or to go-live of core functions under a phased plan; (c) migration of historical data, documents and records from the current system; (d) integrations with Microsoft Entra ID, Microsoft 365/SharePoint, Power BI/Microsoft Fabric and ERA's finance system; (e) training and knowledge transfer; (f) ongoing support, maintenance and product updates; and (g) transition assistance at expiry or termination.

Current Environment and Volumes

The following estimates are provided in accordance with Section 4.3:

Item	Estimate
Current system	Grant-Manager
Funding programs (ERA and FIFC)	29 active
Expressions of Interest per year	~260
Full Project Proposals per year	~70
Active projects under management	180 (ERA & FIFC)
Milestone claims per year	Approximately 250
Internal users (ERA staff, Project Advisors, reviewers)	46
Current active applicant accounts	~700
Historical data to migrate	10 years, 4500 records ~ 30 GB of data
Finance system	Xero

Implementation Expectations

Proponents may propose their own implementation approach, including a phased plan. ERA expects the approach to include, at a minimum:

(a) **Deliverables:** a project plan and schedule; a confirmed configuration and requirements document; a data migration plan, including data mapping and reconciliation; a test plan, including user acceptance testing by ERA staff; a training plan; and a cutover plan.

(b) **Governance:** a named Proponent project manager, regular status reporting, and a change-control process for any change to scope, schedule or cost.

(c) **ERA's role:** ERA will provide a project lead and subject-matter experts from its programs and finance teams. ERA staff availability is limited, so the Proponent must state the time it needs from ERA at each phase.

(d) **Timing:** go-live should not fall within four weeks of a major intake deadline or ERA's fiscal year-end. Grant Manager will remain in operation until Go-live Acceptance, and the cutover plan must address how data entered during implementation is carried over.

(e) **Stabilization:** after go-live, the Proponent must provide a stabilization period of at least 60 days with enhanced support before the transition to standard support.

1.2 Scope of Contract

Any terms in or referenced by a Proponent's Proposal, quotation, order form, website, click-through agreement or other standard vendor document will not apply unless expressly incorporated into the executed Agreement, and are subject to Section 8.2.

1.3 Insurance and WCB Requirements

CGL Insurance: The successful Proponent shall, at its own expense and without limiting its liabilities under the Agreement, insure its operations under a contract of either Comprehensive or Commercial General Liability with insurers licensed in Alberta in an amount of not less than \$2,000,000 per occurrence (annual general aggregate, if any, of not less than \$2,000,000), insuring against bodily injury, personal injury and property damage or loss. Such insurance policy or policies shall include: (i) products and completed operations liability; (ii) employees as additional insured; (iii) contractor's protective liability; (iv) cross liability; and (v) blanket contractual liability. Any such insurance policy or policies shall name the Climate Change and Emissions Management (CCEMC) Corporation operating as Emissions Reduction Alberta, and Fuel Innovation Fund Corporation, together with their directors, officers, employees and agents, as additional insureds to the extent of their interests.

Technology Errors and Omissions: The successful Proponent shall maintain Technology Errors and Omissions insurance of not less than \$2,000,000 per claim and \$5,000,000 in the annual aggregate.

Cyber Liability: The successful Proponent shall maintain Cyber Liability insurance, including privacy breach response, network security and data restoration costs, of not less than \$5,000,000 per claim and in the annual aggregate.

Certificates of insurance must be provided before execution of the Agreement and on each renewal.

WCB: The successful Proponent shall, where required by the *Workers' Compensation Act* (Alberta), be registered and in good standing with the Workers' Compensation Board – Alberta, and shall provide, on request, a clearance letter before execution of the Agreement.

Proposed alternatives to these requirements may be submitted under Appendix C, C-35.

1.4 Privacy, Security and AI Requirements

The successful Proponent shall implement and maintain appropriate administrative, technical and physical safeguards to protect ERA Information and the Services against unauthorized access, use, disclosure, modification, loss or destruction.

Security, privacy and AI requirements are set out in Appendix C – ERA Contractual Requirements, including applicable obligations relating to data residency, encryption, access management, security assurance, incident notification, records management, subcontractors and responsible use of artificial intelligence.

The Proponent shall comply with all applicable requirements in Appendix C. Part A – Mandatory Requirements are non-negotiable, while any proposed exceptions to Part B – Core Requirements must be disclosed in Schedule D – Exceptions Statement.

APPENDIX B – PLATFORM REQUIREMENTS & EVALUATION CRITERIA

Proposals will be evaluated using a structured scoring methodology:

- **Scoring Scale:** Each sub-criterion will be scored from 0 to 5 (0 = Not addressed; 1 = Poor; 2 = Partially meets; 3 = Meets; 4 = Exceeds; 5 = Leading Practice). Sub-scores will be aggregated and weighted according to the criteria set out below.
- **Evaluation Basis:** Only the information contained in the Proposal, together with any clarifications formally requested by ERA and information obtained in Stage III under Section 7.3, will be considered.
- **Alternative approaches:** Proponents are encouraged to propose approaches that differ from those implied by an outcome where they offer a better result for ERA. Alternative approaches will be scored on how well they achieve the outcome, not on how closely they match ERA's current processes.

Criterion 1 – Functional Solution and User Experience (41%)

ERA is not prescribing how the platform should work. For each sub-criterion, describe how your solution delivers what ERA wants, what ERA would configure versus what would require custom development, and any approaches you recommend based on experience with comparable funders. These will be tested through the Stage III demonstration scenarios. A minimum score of 60% on Criterion 1 is required to proceed (Section 7.3).

1A. Simple, guided application intake (7%)

What ERA wants: A single, guided application process from funding program through Expression of Interest (EOI) and Full Project Proposal (FPP), with information entered once and carried forward. ERA receives about 260 EOIs and 70 FPPs a year.

Address: Flexible program design (one- or multi-stage processes, concurrent programs with different criteria, sections and workflows, and time-bound or continuous intake with invitation-only access); a user-friendly applicant interface supporting rich text and other configurable field types; uploading attachments in multiple common file formats; validation of required fields and attachments to reduce incomplete submissions; hiding or removing unused fields; transferring applications between programs; keeping applicants informed of their status; exporting application data and attachments; and ERA configuring and launching programs without vendor support. Automated generation and delivery of application status updates and notifications is desirable.

1B. Consistent, defensible review and decisions (3%)

What ERA wants: A consistent, auditable process from reviewer assignment through recommendation and approval.

Address: Conflict-of-interest declaration and management before review; internal and external reviewers; multi-level approvals; traceability of every score, recommendation and decision; and how review cycles are shortened.

1C. One record from contract to close-out (7%)

What ERA wants: An approved application becomes a funded project with one record covering the Board decisions, funding conditions, contracting stage work flow approvals project lifecycle including milestones, deliverables, budget and amendments through to close-out.

Address: **Funding condition requirements**, generating contribution and amendment agreements from platform data; minor and major change requests, with approvals, and full history; recipients and ERA working on and editing files in the platform; and project status at a glance.

1D. Efficient claims and payments (7%)

What ERA wants: Milestone claims that move from submission to payment with automated controls that support compliance with contribution agreements and minimize manual processing.

Address: Validation of claims against milestones and funding limits; variance calculations; approval workflows with appropriate authorization; integration with ERA's finance system without duplicate entry; and payment status visible to ERA and recipients.

1E. Self-service reporting and portfolio insight (6%)

What ERA wants: Staff who can independently access current project and portfolio information for financial reporting, cash flow forecasting, performance measurement and executive reporting.

Address: Self-service reports and dashboards; financial forecasting; integration with Power BI and Microsoft Fabric; and access to underlying data without vendor assistance.

1F. Connected relationships, records and ERA/FIFC separation (5%)

What ERA wants: Each organization, contact and document managed once across all programs and projects, in line with ERA's records requirements, with ERA and FIFC kept appropriately separate.

Address: A single view of each applicant's history with ERA; communications; documents that are searchable, editable, version-controlled and retained according to ERA's retention schedule; and how permissions, workflows, records and reporting can be configured separately for ERA and FIFC, while enabling authorized consolidated reporting across both.

1G. Responsible, AI-assisted administration (6%)

What ERA wants: AI that makes application review and program administration faster and more consistent, while every funding decision stays with ERA personnel.

Address: AI capabilities available today, such as completeness checks, summaries and claim reviews (distinguished from roadmap items, and identifying what is included in the base price); outputs that show their sources and can be verified; ERA control over which AI features are on, for which programs and users; how ERA's own AI tools, such as Microsoft Copilot, can work with platform data; and protection against manipulated or inaccurate outputs, including prompt injection through applicant documents.

Criterion 2 – Technical Architecture, Security and Integrations (13%)

Appendix C sets ERA's minimum security, privacy and technical requirements. Confirm those in your Appendix C response, not here. For each sub-criterion, describe how your solution delivers what ERA wants and where it goes beyond the Appendix C minimums.

2A. Secure and private by design (5%)

What ERA wants: ERA Information that is protected, and the ability for ERA to demonstrate compliance with POPA.

Address: Your security program, including the scope and currency of your SOC 2 or ISO 27001 assurance, penetration testing and vulnerability management; identity and access controls; support for privacy impact assessments; and any security incidents or breaches in the past three years and how they were handled.

2B. Reliable when it matters most (4%)

What ERA wants: A platform that stays available and responsive, including at intake deadlines when volumes peak.

Address: Hosting architecture; availability and recovery commitments (RTO and RPO) and how recovery is tested; and how the platform handles peak loads and growth.

2C. Connected to ERA's environment (4%)

What ERA wants: A platform that works with ERA's Microsoft environment and finance system, so information is entered once and flows where it is needed.

Address: Sign-in with ERA credentials; document and data exchange with Microsoft 365 and SharePoint; payment integration with the finance system; data feeds to Power BI and Microsoft Fabric; which integrations work out of the box, which need configuration and which need custom development; and how integrations are maintained through product updates.

Criterion 3 – Implementation and Data Migration (13%)

3A. Live within six months (5%)

What ERA wants: Go-live within six months, or core intake and review functions within six months under a phased plan.

Address: Your implementation approach, work plan and governance, addressing the Implementation Expectations in Appendix A; how requirements are confirmed and configuration is tested, including user acceptance testing; cutover and post-go-live stabilization; and the ERA staff time required at each phase, with key risks and dependencies.

3B. Complete, trusted historical data (5%)

What ERA wants: Grant Manager data, documents and records migrated accurately, with their relationships intact and nothing lost.

Address: Your migration approach and tools; what you recommend migrating and what you recommend archiving; how migrated data is reconciled to the source and signed off by ERA; and what ERA must provide.

3C. ERA self-sufficient after go-live (3%)

What ERA wants: Administrators and staff who can run and adapt the platform without relying on the vendor.

Address: Training for administrators, staff and applicants; knowledge transfer; change management; and keeping training materials current as the product changes.

Criterion 4 – Vendor Capability, Support and Product Sustainability (13%)

4A. Proven with comparable funders (4%)

What ERA wants: A platform and team that have already delivered for public-sector or not-for-profit funders of similar complexity.

Address: Your relevant experience, including that of any subcontractors, and how it relates to the references in Schedule B, which ERA may contact in Stage III under Section 7.3.

4B. The right team (3%)

What ERA wants: A qualified team with the capacity to deliver on schedule, and continuity from implementation into ongoing support.

Address: Named key personnel and their roles and experience, including any subcontractors; and your capacity to deliver alongside other commitments.

4C. Responsive ongoing support (3%)

What ERA wants: Issues resolved quickly, especially around intake deadlines.

Address: Support availability during ERA's business hours (Mountain Time); severity levels, response times and escalation; a named contact for ERA; and anything beyond the minimums in C-21 and C-33.

4D. A product that keeps improving (3%)

What ERA wants: A platform that stays current, secure and supported throughout the contract term.

Address: Release, upgrade and security-update practices, and whether they are included in the subscription; your product and AI roadmap, with timelines and whether new features will cost extra; and your company's financial stability and long-term viability.

Criterion 5 - Pricing & Overall Value (20%)

Only Proposals that meet the technical thresholds in Section 7.3 will be scored under Criterion 5.

5A. Total Cost of Ownership("TCO") (12%)

The Evaluated TCO is the total cost of implementing and operating the complete solution proposed to meet the requirements of this RFP, including the implementation phase and the first five (5) years after go-live acceptance, in Canadian dollars excluding GST. Only enhancements that are not necessary to meet the requirements and outcomes of this RFP may be excluded from the Evaluated TCO and prices separately in Schedule A.

5B. Pricing Transparency and Predictability (4%)

Evaluates the completeness and clarity of the pricing information provided in Schedule A table, including pricing assumptions, exclusions, usage limits, additional fees, and annual price adjustments.

5C. Commercial Value and Flexibility (4%):

Evaluates the proposed commercial terms, including contract and renewal pricing, scalability, price protections, termination provisions, exit and data-retrieval costs, and any exceptions to Appendix C, Part B identified in Schedule D.

Stage III Demonstration Scenarios

Short-listed Proponents will demonstrate their proposed solution live, using their own demonstration environment and sample data, and following the scenarios below. Each scenario tests one or more of the outcomes in outcomes in Appendix B, as indicated. The RFP Manager will confirm the presentation date, format and time allocation with each short-listed Proponent at least five (5) business days in advance.

1.Funding program setup, Application and Review: An ERA administrator configures a new funding program (form, workflow and notifications) without vendor assistance. The Proponent then demonstrates how permissions and workflows can be configured independently for ERA and FIFC, including both a multi-stage EOI-to-FPP call and a single-stage call. An applicant submits an EOI, is invited to an FPP, and the EOI information carries forward. The Proponent demonstrates how ERA administrators can export application and program data and download applicants' submissions. Reviewers declare conflicts, score the FPP using an AI-generated summary that shows its sources, and a funding recommendation moves through approval (Criterion 1, Outcomes 1A, 1B, 1F and 1G; Criterion 3, Outcome 3C).

2.Project Management, Claims and Payments: An approved FPP becomes a contribution agreement with milestones, and a milestone budget is amended through the change workflow. The applicant submits a milestone claim with a variance from the plan; the variance is flagged, the claim is approved, and payment is exported to the finance system (Criterion 1, Outcomes 1C, 1D and 1G; Criterion 2, Outcome 2C).

3. Portfolio Forecasting and Reporting: An ERA administrator generates a portfolio cash flow forecast of expected milestone payments by month and fiscal year, including treatment of holdbacks and overdue milestones, and builds a dashboard showing ERA and FIFC results separately and combined (Criterion 1, Outcomes 1D, 1E and 1F).

4. Vendor's Choice: Up to fifteen (15) minutes to show what differentiates the Proponent's solution and would most benefit ERA.

Demonstrations should use the Proponent's current product, not pre-recorded material or slides. During the presentation, the evaluation committee may ask the Proponent to make a simple configuration change live, such as adding a form field or a workflow step. The same requests will be made of each short-listed Proponent. Proponents must not use ERA Information or real applicant data in their demonstrations.

Demonstrations are not scored separately. Information obtained will be used to adjust scores for Criteria 1 to 4, as described in Section 7.3.

APPENDIX C – ERA CONTRACTUAL REQUIREMENTS

The requirements below identify ERA's contractual requirements for the proposed SaaS solution. The requirements are organized in two tiers:

Part A – Mandatory Requirements (C-1 to C-13) are non-negotiable and will be assessed on a pass/fail basis at Stage I. A Proposal that does not accept, or cannot comply with, a Part A requirement may be disqualified. Submitting an Exceptions Statement does not cure non-compliance with a Part A requirement.

Part B – Core Requirements (C-14 to C-37) are required terms of the Agreement. A Proponent may propose an exception to a Part B requirement in Schedule D – Exceptions Statement, including its proposed alternative wording. ERA will assess the nature, extent, commercial impact, legal risk and operational impact of each exception as part of the overall evaluation process. A Part B exception will not, on its own, result in disqualification.

Proponents must respond to every requirement in Part A and Part B in the Proponent Response column.

Submission of the Proponent's standard terms does not constitute acceptance by ERA. In accordance with Sections 3.3 and 8.2, the requirements in this Appendix will prevail over any conflicting term of the Proponent's SaaS Agreement, except to the extent ERA expressly agrees in the final executed Agreement to an exception to a Part B requirement identified by the Proponent in Schedule D.

Part A – Mandatory Requirements (pass/fail)

	ERA Contractual Requirement	Minimum Requirement	Proponent Response (Yes/No)
C-1	Canadian data residency	ERA Information at rest must be stored in Canada, including production environments, replicas, backups, disaster-recovery copies and logs containing ERA Information. Any exception requires ERA's prior written approval.	
C-2	ERA ownership and permitted use of data	ERA retains ownership and control of ERA Information. The Proponent may use ERA Information only as necessary to provide the Services and may not sell, monetize, reuse or use it for unrelated purposes.	
C-3	AI/model training restrictions	ERA Information must not be used to train, fine-tune, improve or validate vendor or third-party AI/ML models without ERA's prior written authorization.	
C-4	Independent security assurance	The hosted platform, and any other services that store or process ERA Information, must be covered by a current SOC 2 Type II report, ISO 27001 certification or an independent assurance report acceptable to ERA, and current evidence must be provided on request.	
C-5	Encryption	ERA Information must be encrypted in transit and at rest, including backups, using appropriate industry-standard controls.	
C-6	Privacy / POPA compliance	Proponent must comply with applicable privacy requirements and reasonably assist ERA with privacy assessments, PIAs, data-flow documentation and related privacy/security documentation and the solution must allow ERA to configure applicant-facing collection notices, including disclosure of the	

		use of AI or automated systems under section 5(2)(d) of POPA.	
C-7	Security/privacy incident notification	Proponent must notify ERA without undue delay and, in any event, within 24 hours after becoming aware of an actual or reasonably suspected security or privacy incident affecting ERA Information or the Services, followed by appropriate investigation, updates and remediation information.	
C-8	Data portability and exit	ERA must be able to retrieve its complete data, documents and relevant metadata in usable, commonly supported formats upon request, expiry or termination of the Agreement. The Proponent must provide standard data exports at no additional charge within 30 days of ERA's request, unless a different timeline is agreed to in writing by ERA. Any additional transition or migration assistance must be available at rates disclosed in Schedule A and agreed to by ERA in advance.	
C-9	Secure deletion	Following ERA confirmation that required data has been returned, the Proponent must securely delete remaining ERA Information in accordance with agreed retention requirements and provide written confirmation/certification of deletion.	
C-10	Human review before AI influences a funding decision	AI or automated tools may assist ERA workflows but must not independently make or materially determine eligibility, scoring, ranking, funding, contracting, payment or other funding decisions. Final decisions must remain subject to review and approval by authorized ERA personnel.	
C-11	Web Content Accessibility Guidelines (WCAG) 2.1 AA accessibility	The proposed solution must support compliance with WCAG 2.1 Level AA or higher for all public facing applicant interfaces. Proponents should describe how accessibility compliance is maintained and tested throughout product updates and releases.	
C-12	Governing law and jurisdiction	The Agreement must be governed by the laws of Alberta and the federal laws of Canada that apply there, with disputes resolved in Alberta.	
C-13	Access to information obligations	The Proponent acknowledges that ERA is subject to the <i>Access to Information Act</i> (Alberta). The Proponent's confidentiality terms must not stop ERA from meeting its obligations under that Act or other applicable law. Unless legally prohibited, the Proponent must promptly refer to ERA any access request it receives relating to ERA Information and must not respond except as directed or authorized by ERA.	

Part B – Core Requirements (exceptions evaluated)

	ERA Contractual Requirement	Minimum Requirement	Proponent Response (Yes/No or clarification)
C-14	Microsoft Entra ID single sign-on	The solution supports single sign-on for ERA users through Microsoft Entra ID, using a standard protocol (SAML 2.0 or OpenID Connect). ERA's MFA and conditional access policies must apply. Accounts must	

		be provisioned and deprovisioned in line with ERA's identity lifecycle.	
C-15	Identity and access management	MFA, role-based access and least-privilege controls must apply to privileged and vendor access. Access must be restricted to authorized personnel and periodically reviewed. Critical security patches must be applied within 30 days of release.	
C-16	Security and activity logging	The solution must maintain complete, tamper-evident audit logs for material activities including applications, reviewer actions, scoring changes, approvals, funding decisions, AI-generated outputs used in a workflow and the user actions taken on them, project amendments, financial/claim actions, document changes, administrative changes and privileged access. Logs must be searchable/exportable by ERA.	
C-17	Subprocessors and third parties	Proponent must disclose material subcontractors, subprocessors, hosting providers and third-party systems that store, process, transmit or access ERA Information, including processing locations, and provide advance notice of material changes. The Proponent remains responsible for the acts and omissions of its subcontractors and subprocessors and must ensure they are bound by privacy and security obligations no less protective than those in the Agreement.	
C-18	AI controls and safeguards	AI features must be disabled by default and enabled only by authorized ERA administrators, by program, workflow stage and user role. New AI features introduced through product updates must not be enabled without ERA approval. Any third-party AI model provider that processes ERA Information must be disclosed as a subprocessor, along with its processing location. Such providers must not retain prompts or outputs beyond what is needed to provide the service. Processing outside Canada requires ERA's prior written approval. The Proponent must maintain and describe safeguards against manipulation of AI outputs, including instructions embedded in submitted documents (prompt injection), and must monitor the accuracy and consistency of AI outputs.	
C-19	Business continuity & disaster recovery commitments	Proponent must maintain documented and regularly tested business-continuity and disaster-recovery arrangements and disclose applicable recovery objectives and testing practices.	
C-20	Records retention and defensible deletion	The solution must support ERA's applicable retention requirements, legal holds where required, controlled deletion and evidence/auditability of deletion activities.	

C-21	Support and escalation	Proponent must provide defined support availability, severity levels, response expectations and escalation procedures for critical outages, security incidents and other high-impact issues.	
C-22	Material change notification	Proponent must provide advance notice of material changes affecting hosting, data location, subprocessors, security architecture, material functionality or approved use of AI involving ERA Information.	
C-23	Legal demands for data	Unless legally prohibited, Proponent must notify ERA of a government or legal demand for ERA Information, reasonably challenge overbroad demands and disclose only information legally required.	
C-24	Remote access from outside Canada	Where approved for support purposes, remote access from outside Canada must use MFA and least-privilege access, be fully logged, and must not result in bulk export or persistent storage of ERA Information outside Canada.	
C-25	Configurable administration without vendor dependency	Authorized ERA administrators must be able to create or modify forms, fields, workflow steps, statuses, templates, notifications, approval routing, reporting views and similar business configuration without requiring vendor development for routine changes.	
C-26	Complete history	ERA must be able to determine who changed a material record, what was changed, when it changed and, where applicable, the prior value, without relying on the vendor to retrieve this information.	
C-27	Direct data access for reporting and analytics	ERA must have direct, ongoing access to its underlying data for reporting, analytics and integration, without relying on the vendor or vendor-built reports. The solution must support APIs, standard connectors, scheduled extracts or other secure methods that let ERA use its data in tools such as Power BI, Microsoft Fabric and ERA-approved AI tools such as Microsoft Copilot, at no extra charge beyond the pricing in Schedule A.	
C-28	ERA termination rights	ERA may terminate for convenience on 90 days' written notice, and for cause where a material breach is not cured within an agreed period. The Agreement must not renew automatically; renewal is at ERA's sole discretion.	
C-29	No suspension or data hold-back	The Proponent must not suspend the service, restrict access, or withhold or delete ERA Information because of a fee dispute without written notice, a reasonable cure period and an escalation process. ERA must keep access to its data at all times.	

C-30	Limitation of Liability	Any general limitation of the Proponent's liability must not apply to, or must be subject to a separate higher limit for, breaches of privacy, security or confidentiality obligations and loss or corruption of ERA Information. The Proponent must identify in its Proponent Response the liability limit it proposes for these matters, including any separate or aggregate limits and applicable exclusions. Any exception to this requirement must be identified in Schedule D. ERA will assess the proposed liability structure as part of the evaluation, and the final limits will be subject to negotiation and agreement by ERA. The treatment of liability arising from the intellectual property indemnity will be addressed in the negotiated Agreement.	
C-31	Intellectual property indemnity	The Proponent must defend, indemnify and hold harmless ERA and its personnel from third-party claims that the Services or deliverables infringe or misappropriate intellectual property rights. If the Services or any material component become, or are reasonably likely to become, subject to such a claim, the Proponent must, at its cost and without materially reducing the functionality of the Services: (i) obtain the right for ERA to continue using the affected Services; or (ii) modify or replace the affected Services so they are non-infringing. If neither option is reasonably available, ERA may terminate the affected Services and receive an appropriate refund of prepaid fees for Services not received.	
C-32	Price protection	Fees are fixed for the initial term except for escalation stated in Schedule A. Renewal increases are capped at the lesser of Alberta CPI or 3% per year.	
C-33	Service availability	The platform must be available at least 99.5% of each month, excluding scheduled maintenance outside ERA business hours, with service credits for shortfalls and enhanced support during application intake deadlines.	
C-34	No unilateral changes	The Proponent may not unilaterally amend the Agreement, including terms incorporated by hyperlink, or materially reduce functionality, security or service levels during the term.	
C-35	Insurance	The Proponent must maintain the insurance set out in Appendix A, Section 1.3. The Cyber Liability and Technology Errors and Omissions requirements may be satisfied through insurance maintained by the Proponent and/or a hosting, platform or other material service provider, provided the Proponent demonstrates to ERA's satisfaction that the combined coverage applies to the Services and adequately covers the risks and activities for which	

		that provider is responsible. The Proponent remains responsible for the performance of the Services and the acts and omissions of its subcontractors and service providers. A Proponent may propose alternative limits or coverage structures in Schedule D, which ERA will assess having regard to the nature and allocation of risk.	
C-36	Implementation and acceptance	Implementation fees must be tied to deliverables or milestones in the implementation plan, with at least 10% held back until Go-live Acceptance. Recurring subscription fees begin no earlier than Go-live Acceptance, unless otherwise agreed in writing by ERA. If implementation is materially delayed beyond the agreed implementation schedule for reasons attributable to the Proponent, ERA must have appropriate remedies, including the right to require a remediation plan and, where the delay is not remedied within an agreed period, terminate the affected implementation services without penalty.	
C-37	Change of control and vendor continuity	The Agreement must require reasonable advance notice of any material change of control or other event reasonably expected to materially affect the Proponent's ability to provide the Services. ERA must have appropriate termination and transition rights where such an event materially adversely affects the Services or ERA's risk profile.	

SCHEDULE A – PRICING INFORMATION

General Pricing Requirements

- Proponents must disclose all costs required to implement and operate the proposed solution, including any additional fees, usage-based charges or potential cost increases including the fees of any subcontractors or partners. Costs not identified in the Pricing Information will be deemed included in the proposed pricing, unless otherwise agreed to by ERA in writing.
- Pricing information must be submitted in a separate file from the main proposal.
- All prices must be provided in Canadian dollars, exclusive of GST, any applicable taxes should be identified separately.
- Proposed pricing must include all costs necessary to deliver the proposed solution and meet the requirements of this RFP. All pricing assumptions or contingencies, including any minimum commitments, usage limits or factors that may result in additional costs must be clearly disclosed.

Detailed Pricing Information

- Proponents must provide a five-year total cost of ownership, distinguishing between one-time implementation costs, recurring annual costs, and optional costs. The total, covering the implementation phase and the first five (5) years following go-live acceptance and excluding discretionary enhancements, will be used as the Evaluated TCO in Appendix B, Criterion 5.
- The pricing table below is provided as a guide. Proponents must add, remove, or modify rows as necessary to reflect their proposed pricing and billing structure, ensuring all costs required to deliver the proposed solution are included.
- All pricing assumptions and calculations must be clearly disclosed, including applicable quantities, unit rates, usage volumes, and escalation factors, to allow ERA to independently recalculate and validate the proposed costs.
- Any functionality or service included in the proposed solution but not separately priced will be assumed to be included in the total proposed cost.

Cost category	Assumptions/ Calculations	Implementat ion phase	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Implementation and setup (including configuration, migration and training)								
Subscription and licensing								
Hosting (if separately priced)								
Support and maintenance (if separately priced)								
Required third-party products and services								
Other required costs (specify)								
Evaluated TCO								
<i>Not included in the Evaluated TCO:</i>								
Discretionary enhancements (not required to meet RFP requirements)								

Cost category	Assumptions/ Calculations	Implementat ion phase	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Professional services and transition assistance rates (by role)								

Pricing Assumptions and Exclusions

Proponents must disclose any assumptions, limitations or conditions that may affect the proposed pricing, including:

(a) Pricing model and usage limits: Any minimum commitments, included volumes, usage limits and applicable overage rates.

(b) Price changes: Any annual escalation, pricing adjustments or renewal pricing provisions.

(c) Exclusions: Any discretionary enhancements or services excluded from the Evaluated TCO. All functionality and services required to meet the RFP requirements and outcomes must be included in the Evaluated TCO.

(d) Key assumptions: Any other assumptions or dependencies that may affect pricing, including ERA resource requirements, data migration volumes and implementation timelines.

(e) AI: For each AI feature proposed, state whether it is included in the base subscription for the full initial term and any renewal term, or priced separately. Identify any usage-based charges (such as credits, tokens or per-document fees), included usage allowances, overage rates, and any plans to move AI features to a premium tier or separate product. AI features not identified as separately priced will be deemed included in the base subscription for the full term.

Proposed implementation payment milestones, consistent with Appendix C (implementation and acceptance).

Proponents may propose alternative pricing models (for example, fixed-fee implementation or phased pricing), provided the table above is completed so that the Evaluated TCO can be compared.

SCHEDULE B – REFERENCE FORM

Each Proponent must provide three (3) references from clients that have implemented the proposed platform and have used it in production within the last three (3) years. References may relate to the Proponent or to its subcontractors or partners, provided that at least one (1) reference relates to the proponent. At least one reference should be a public-sector body, funding agency or not-for-profit organization that administers grant or contribution funding. References should be able to speak to the Proponent's implementation and data migration, platform stability, responsiveness and ongoing support. ERA may contact references during Stage III in accordance with Section 7.3.

	Reference 1	Reference 2	Reference 3
Client organization			
Type of organization	☐ Public sector ☐ Not-for-profit ☐ Private	☐ Public sector ☐ Not-for-profit ☐ Private	☐ Public sector ☐ Not-for-profit ☐ Private
Location			
	Reference relates to: ☐ Proponent ☐ Subcontractor or partner (name)	Reference relates to: ☐ Proponent ☐ Subcontractor or partner (name)	Reference relates to: ☐ Proponent ☐ Subcontractor or partner (name)
Platform and modules implemented			
Description of implementation (funding programs supported, data migrated)			
Approximate number of internal users and applications processed per year			
Implementation start date and go-live date			
Current status	☐ In production ☐ No longer in production (explain):	☐ In production ☐ No longer in production (explain):	☐ In production ☐ No longer in production (explain):
Contact name and position			
Contact phone and email			

SCHEDULE C – PROPOSAL SIGNATURE FORM

*****MUST BE SUBMITTED AS PART OF PROPOSAL*****

This form must be completed, signed and included with each Proposal. A Proposal submitted without it may be disqualified.

1.0 Proponent Information

Full legal name of Proponent:	[enter response here]
Other names under which the Proponent carries on business (if any):	[enter response here]
Address (street, city, province/state, postal code):	[enter response here]
Website:	[enter response here]
Contact for this Proposal (name, title, phone and email):	[enter response here]
Subcontractors or partners and their roles (if any)	[enter response here]

2.0 Proposal Checklist

The Proponent confirms that its Proposal includes:

ITEM	INITIAL TO ACKNOWLEDGE
Response to Appendix B – Evaluation Criteria	
Appendix C – Proponent Response (Part A and Part B)	
Proposed SaaS Agreement, subscription terms, service level agreement and data processing and privacy terms (Section 6.1(a)(iii))	
Subcontractor and subprocessor information, including any third-party AI model providers (Section 6.1(a)(iv))	
Schedule A – Pricing Information (separate file)	
Schedule B – Reference Form	
Schedule D – Exceptions Statement	
Confirmation of insurance as set out in Appendix A or proposed alternative in Schedule D	

3.0 Declarations

By signing below, the Proponent confirms that:

- (a) it is authorized to carry on business of this nature and is not prevented by any law of Canada or Alberta from entering into and performing the Agreement;

- (b) the person signing is authorized to bind the Proponent and, where the Proposal is submitted on behalf of the Proponent and other persons, to submit it on their behalf;
- (c) it has reviewed the RFP, including all Addenda, and agrees to its terms, and it acknowledges that this RFP is not a legally binding bidding process and that no contract will exist until the Agreement is executed;
- (d) it proposes to perform the Scope of Work at the prices set out in Schedule A, subject to the negotiation and execution of the Agreement in accordance with Article 8; and
- (e) the information in its Proposal, including its confirmations of the requirements in Appendix C, is accurate and complete, and it will provide supporting evidence on request in accordance with Section 6.1(c).

4.0 Conflict of Interest

The Proponent must disclose any actual or potential conflict of interest. This includes any business or financial relationship with ERA, the Fuel Innovation Fund Corporation or ERA Personnel (other than existing contracts with ERA); any personal relationship with ERA Personnel involved in this RFP; any ownership, directorship or financial interest in the Proponent held by ERA Personnel or their immediate relatives; and any current ERA Personnel, or anyone who was ERA Personnel in the past twelve (12) months, who helped prepare the Proposal. The Proponent will notify the RFP Manager of any change during the RFP process and the term of any Agreement. Failure to disclose may result in disqualification or termination of the Agreement.

- ☐ There are no conflicts of interest to disclose.
- ☐ Details of an actual or potential conflict of interest are attached.

5.0 Addenda

Addenda received (list numbers, or write "None"):	[enter response here]
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6.0 Signature

Name of Proponent Representative

Title of Proponent Representative

Signature of Proponent Representative

Date

*****MUST BE SUBMITTED AS PART OF PROPOSAL*****

[illegible]