

Request for Qualifications

Emissions Reduction Alberta - External Expert Reviewer

1 Instructions

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

2 Introduction

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

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

3 Purpose

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

The External Reviewer Database is intended to be populated with *individuals* as opposed to *organizations*. As such, each submission to this RFQ should pertain to a single individual, representing either themselves or their organization. Organizations who are interested in responding to this RFQ should submit a separate response for each individual of their organization seeking to become a reviewer.

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

4 Procedure

ERA’s process for compilation of the External Reviewer Database is as follows:

1. ERA opens the application process for the External Reviewer Database (September 2023)
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 in the External Reviewer Database. No notification will be provided regarding placement on the External Reviewer Database. **ERA will not respond to inquiries regarding the status of applications to this RFQ or placement within the External Reviewer Database.**

From time to time, on an as-needed basis, ERA will use the External Reviewer Database to source reviewers for ERA-funded programs according to the following process:

1. ERA will conduct periodic (ad-hoc) analyses of entries in the External Reviewer Database to categorize the expertise of each reviewer and to assess the alignment of the reviewer’s experience with current and upcoming ERA programs.
2. Based on the needs of each ERA program, ERA will assemble an expert review team from various sources, including but not limited to the External Reviewer Database, as determined by ERA in its sole discretion. Reviewer candidates will be identified, in part, based on their alignment with the Reviewer Skill Matrix developed for each ERA program, as described in Section 8.
3. Reviewers selected from the External Reviewer Database will be contacted by ERA to confirm availability and willingness to participate. At the time of contact, program details, timelines, and expected workload will be communicated.
4. Selected reviewers will be subject to additional orientation, conflict of interest screening, and contracting prior to review engagement. All reviewers must enter into a consulting services contract with ERA prior to being assigned to a review.

5 Services

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

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

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

6 Requirements and Qualifications

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

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

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

- familiarity with Alberta’s climate change legislation, emissions management policies, energy and energy efficiency policies, and other relevant regulations and legislation; and

- previous experience with project selection, due diligence, technical risk assessment, and public funding processes.

7 Response Guidelines

In completing the application form, all applicants must:

- accept the declaration to provide only information that is accurate and correct;
- answer all questions fully;
- complete the reviewer skill self-assessment;
- supply a description and/or keywords for any relevant element of expertise not included in the skill self-assessment;
- 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 Desired Reviewer Expertise and Skill Matrix

External reviewer services are solicited to support initiatives aligned with ERA’s mandate and Technology Roadmap (<https://eralberta.ca/about-era/technology-roadmap/>). ERA uses a Reviewer Skill Matrix to assess review needs and to align reviewers based on the expertise required for any particular program. A sample ERA Reviewer Skill Matrix is provided below. **Note that ERA intends to revise the matrix for each funding program and reserves the right to modify a matrix at any time and without notice. ERA will not share or otherwise publish the matrix for a given program and will not release its assessment of any reviewer.**

ERA Reviewer Skill Matrix								
Funding Program:	Hydrogen Challenge [Example Only]							
Skills/ Expertise	Reviewer Name							
	Reviewer A	Reviewer B	Reviewer C	Reviewer D	Reviewer E	Reviewer F	Reviewer G	
Technical Areas								
Hydrogen production	■	■		■		■		
Hydrogen transport	■		■				■	
Hydrogen storage			■			■	■	
Hydrogen end use	■	■	■	■				
Business Areas								
Hydrogen markets	■		■	■		■	■	
Business development		■			■	■	■	
Technology Commercialization		■		■	■			
Project finance	■		■	■	■	■		
Cross-Cutting Areas								
Risk assessment		■			■			
Project design and management		■		■			■	
GHG Quantification	■			■		■	■	
Economic Benefits	■		■	■	■	■	■	
Social benefits / ESG / EDI	■	■	■		■	■	■	
LEGEND	■ Subject matter expert		■ Professional / practical expertise			■ No expertise or N/A		

ERA’s assessment of reviewer alignment with the matrix for a given program will be based on multiple factors including, but not limited to, reviewer responses to this RFQ, their resumes, and reference checks.

A key element of reviewer responses to this RFQ is a self-assessment of their own expertise in areas relevant to ERA. As shown in the sample skills matrix above, ERA does not expect reviewers to be experts in all areas relevant to a program. However, they should have relevant expertise that fills key gaps in the overall review panel. ERA therefore encourages reviewers to note all skills for which they have a) relevant experience and b) confidence in their ability to adjudicate.

There is a broad set of skills and expertise that are relevant to ERA’s mandate and funding programs. The following list summarizes the areas that are listed in the Self-Assessment as of the RFQ launch. ERA reserves the right to modify skills lists at any time without notice.

ERA External Reviewer Database – Skill Areas of interest	
Technical Expertise	
<ul style="list-style-type: none"> ● Industrial Transformation <ul style="list-style-type: none"> ○ Advanced materials and manufacturing ○ Fuel switching and electrification ○ Novel industrial processes ○ Low carbon industrial heat ○ Nuclear energy ○ Novel agriculture and agri-food (e.g.: precision ag., enteric methane management, etc.) ○ Hydrocarbons beyond combustion ○ Critical minerals and battery supply chain ● Energy Efficiency <ul style="list-style-type: none"> ○ Smart grid and grid edge ○ Electricity transmission, distribution, and grid services ○ Demand response and optimization ○ Industrial energy efficiency ○ Low carbon buildings and infrastructure ○ Methane management ○ Machine learning and artificial intelligence ○ Digitization and automation 	<ul style="list-style-type: none"> ● Carbon Sequestration <ul style="list-style-type: none"> ○ Carbon capture technologies ○ CO₂ transportation ○ Geological carbon sequestration ○ CO₂ utilization or conversion ○ Natural carbon sinks ● Future Fuels <ul style="list-style-type: none"> ○ Hydrogen ○ Zero emissions vehicles and infrastructure ○ Synthetic fuels ○ Biofuels and bioenergy ○ Renewable energy (e.g. wind, solar, geothermal, etc.) ○ Energy storage ● Circular economy <ul style="list-style-type: none"> ○ Waste management and valorization ○ Green materials ○ Regenerative agriculture ○ Alternative fertilizers ○ Biorefinery / waste-to-energy ○ Plastics (circular plastics, bioplastics, etc.)
Business and Commercialization Expertise	Cross Cutting Expertise
<ul style="list-style-type: none"> ● Commercialization and business development ● Investment and venture capital ● Business case/ financial analysis ● Technoeconomic analysis ● Market assessment ● Project management and execution 	<ul style="list-style-type: none"> ● Environmental impact analysis ● Energy systems analysis ● Lifecycle analysis ● GHG quantification ● Socioeconomic impact assessment ● Equity, diversity, and inclusion ● Indigenous relations

NOTE: The expertise highlighted above are solely for guidance and are not intended to be exhaustive. Applicants are encouraged to include other skills not included in this list as part of their response to the application form.

9 Terms and Conditions

9.1 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 External Reviewer Database as outlined in this RFQ;
- issue a new RFQ for ERA's External Reviewer 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 external reviewers from outside of the External Reviewers Database developed from this application.

Furthermore:

- any external reviewer may, at the sole discretion of ERA, lose their qualification status for unsatisfactory performance and/or misrepresentation of expertise;
- any Contract(s) awarded after this RFQ shall include, among other things, non-disclosure and confidentiality requirements. As such, applicants approved as reviewers, and selected for Contracts, must enter into a consulting services agreement with ERA to provide reviewer 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 External Reviewers Database does not guarantee that the applicant will receive an invitation for a detailed evaluation or a Contract from ERA, nor does it imply that the applicant has any type of contractual or employment relationship with ERA either now or in the future;
- ERA 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 reviewers 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.

9.2 Confidentiality

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

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

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

9.3 Data Storage and Security

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

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

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

Applicants who enter Contracts with ERA:

- will provide their own office space, equipment, computers, software, telephone, and videoconferencing capabilities as required, as well as other tools necessary for the purpose of performing the services. Amenities, including but not limited to secretarial services and parking, will not be provided by ERA. On-site equipment, computers, software, telephone, and photocopy facilities may be available for use when the work requires face-to-face collaboration at an ERA office location;
- may be required to travel to meet contractual requirements and may be expected to attend occasional project meetings at their own expense;
- must submit expense invoices to be reimbursed for approved expenses incurred while delivering the services. Documentation, claims, and reimbursement of expenses shall be

conducted as per the standard ERA reimbursement policy which will be attached to the reviewer Contract; and

- are required, at their own expense, to obtain insurance under a contract of general liability insurance in accordance with the *Insurance Act*, RSA 2000, c I-3 in an amount not less than \$2,000,000 inclusive per occurrence insuring against bodily injury, personal injury and property damage including loss of use thereof. Such insurance shall include blanket contractual liability. Evidence of such insurance in a format acceptable to ERA shall be made available at ERA's request, as a condition of any Contract(s).

9.5 Reporting

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

9.6 Lobbyists Act

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

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

9.7 Copyright

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

9.8 Conflict of Interest

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

9.9 Irrevocability of Responses

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

9.10 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.

9.11 Response Returns

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

9.12 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.

10 Further Information or Inquiry

For questions regarding ERA's mandate, processes, policies, or the specifics of this application, prospective applicants are encouraged to contact Emmanuella Sea-Nduka (eseanduka@eralberta.ca) or Christophe Owtrim (cowtrim@eralberta.ca).

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

11 Application Form

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

[**CLICK HERE TO FILL THE APPLICATION FORM**](#)