Forest Resource Improvement Association of Alberta

CARIBOU HABITAT RECOVERY PROGRAM

REQUEST FOR PROPOSALS

OPERATIONAL PLANNING FOR CARIBOU HABITAT RESTORATION IN THE LITTLE SMOKY and A LA PECHE CARIBOU RANGES

REFERENCE:

FRIAA - CHRP RFP JUNE 2024 OPERATIONAL PLANNING

Issue Date:	**June 25, 2024**
Closing Date/Time:	**July 24, 2024 - 16:00 hrs**
Information Call:	**July 8, 2024 – 13:00 hrs**
Submission Portal:	**https://friaa.ab.ca/program-submissions/**
Inquiry Email:	**admin@friaa.ab.ca**
Website:	**www.friaa.ab.ca**
Mailing:	**Box 11094** **Main Post Office** **Edmonton, AB T5J 3K4**

1. INTRODUCTION

1.1 The Forest Resource Improvement Association of Alberta ("**FRIAA**") is inviting the submission of operational planning proposals ("**Proposals**") under the Caribou Habitat Recovery Program (the "**CHRP**"). The following information outlines the intent of this request for proposals ("**RFP**") and provides instructions to prospective applicants.

2. PROGRAM BACKGROUND

2.1 FRIAA was established in 1997 to promote and initiate projects that enhance Alberta's forest resources. In keeping with this primary purpose, FRIAA entered into a Grant Agreement on April 25, 2018 with the Government of Alberta ("**GOA")** for delivery of the CHRP.

2.2 The overall objective of the CHRP is to support efforts to sustaining and improving caribou habitat in a manner that supports healthy and self-sustaining caribou populations. The purpose of the CHRP is to support the Recovery Strategy for the Woodland Caribou Boreal Population, (*Rangifer tarandus caribou*) in Canada and the Recovery Strategy for the Woodland Caribou, Southern Mountain population in Canada by providing funds for eligible activities for projects that: (a) assist Alberta Environment and Protected Areas (the "**Department**") with projects that contribute to the scientific and technical understanding of caribou habitat recovery strategies and activities, (b) provide financial and logistical oversight of funding for planning work required to guide operational work for caribou habitat, or (c) provide logistical oversight of funding for operational landscape work for caribou habitat as supported by the GOA and industry.

2.3 In December 2017, the province of Alberta announced its strategy for Woodland Caribou through the release of the *Provincial Woodland Caribou Range Plan*. This draft plan outlines Alberta's commitment to restoring legacy disturbance features in relation to provincial and federal goals and objectives.

2.4 Alberta has further developed drafts of the "*Provincial Restoration and Establishment Framework for Legacy Seismic Lines in Alberta*" and the "*Visual Guide For Implementing the Restoration and Establishment Framework in Woodland Caribou Habitat in Alberta*" (collectively, the "**Framework**" [1]) that outline a clear approach and restoration objectives for restoration programs within woodland caribou ranges. The Framework is flexible in its delivery to promote innovation while containing clear processes and expectations for program planning, delivery, quality control and monitoring. The Framework outlines necessary steps in planning a restoration program with clear expectations to ensure that treatments have the best opportunity to achieve success.

3. OVERVIEW OF OPERATIONAL PLANNING

3.1 Restoration of legacy features, particularly seismic lines is a key step in restoring habitat in caribou ranges within Alberta. The Department has indicated the need to conduct operational planning in two caribou ranges with legacy seismic lines. The

[1] The Framework documents are available on the FRIAA website https://friaa.ab.ca

two planning ranges are the Little Smoky and A La Peche caribou ranges (collectively the "**Ranges**").

The Operational Plan will cover the area excluding compartments previously set out for operational planning by FRIAA or the GOA. See the map in **Appendix "A"**.

The development of Operational Plans will confirm linear feature conditions including but not limited to acceptable tree density, line coverage, height and species of the advanced regeneration, line width, and site limiting factors. Operational Plans will identify access to and within the developed operational compartments as well as regulatory, land use and other considerations applicable to each of the developed compartments within the Plan.

The development of Operational Plan compartments will identify and prescribe appropriate silviculture and deactivation techniques to promote favourable revegetation conditions through mechanical site preparation, deactivation and tree planting activities.

The Department-approved, final Operational Plans will provide direction for prospective contractors to prepare and submit project proposals to apply prescribed site treatments. Implementation of the final Operational Plans (outside of the scope of this RFP), will call for the application of specialized skills required for heavy equipment site preparation, tree planting and environmental consulting (permitting, consultation and mapping).

3.2 The Little Smoky and A La Peche caribou ranges are located in west-central Alberta. An overview of the planning compartment locations and boundaries are presented on maps in **Appendix "A".**

3.3 The successful applicant will conduct field verification on the ground with aerial (helicopter and/or drone) support, to determine treatment prescriptions and provide Geographic Information System ("**GIS**") data-formats for linear restoration. The are an estimated 663 km available for planning**.**

3.4 Successful applicant must use the Framework and its guiding principles to prepare Operational Plans for the compartments within the identified caribou ranges. "*An Operational Plan For Linear Restoration - Plan Submission Template (V 2.0)*" identifies the required format and information of the plan deliverable. "*Operational Planning GIS Data Template*" is an Excel workbook that provides the GIS data

template, collectively these documents are referred to as (the "**Templates**") and have been provided with this RFP package.

3.5 An update to the Framework Table 3.3, "Defining treated areas, advanced regeneration and project exclusions" is provided in **Appendix "B"**.

3.6 Applicant(s) are responsible to obtain appropriate imagery and supporting data layers including the caribou range boundaries in effect at the time of the project award, required to prepare a proper Operational Plan.

Note: Applicants are encouraged to use the Alberta Biodiversity Monitoring Institute (ABMI) website for downloading current digital data of linear features in the "Wall-to-Wall Human Footprint Inventory".

4. PROPOSAL REQUIREMENTS

4.1 Applicants are advised to pay careful attention to the information provided in this RFP and the Program Outline. Failure to satisfy any term, condition or mandatory requirement of this RFP or the Program Outline may result in the rejection of the Proposal.

4.2 Proposals must be clear and concisely describe the components of the proposed project, including each of the Proposal Requirements set out in subsections 4.3 and 4.4 below.

4.3 **Application Form**

(a) Provide contact information for the Authorized Representative (name, title, phone number, email and address) of the:

(i) applicant organization and the individual(s) authorized to represent the applicant and commit the applicant to the execution of a Project Grant Agreement; and,

(ii) the individual who will manage the project.

(b) Indicate the term and the amount of funding requested to complete the proposed project.

(c) Indicate if you participated in the Information Session, detailed in Section 9 of this RFP.

(d) Briefly describe your understanding of the proposed project.

(e) The Authorized Representative must sign the Project Summary Application form. Signing the Project Summary Application form binds the applicant to the terms and conditions attached thereto.

4.4 **Application Template**

(a) Describe the project delivery approach that demonstrates the applicant's understanding of the scope, objectives, priorities and requirements presented in this RFP and that the proposed project aligns with the Framework and Templates provided with this RFP.

(b) Describe the strategies that the applicant will apply to resource the proposed project. Provide details on the sub-contractors (if any) engaged for the delivery of this project.

(c) Describe any assumptions as to the scope or nature of the work, or any significant factors upon which changes in resource effort, timing or budget may result.

(d) Identify and describe the risks applicable to the proposed project and achievement of the expected outcomes. Propose and describe strategies to mitigate such risks.

(e) Prepare a work plan that identifies major task milestones, sub-tasks, sequence, timing, and duration of these activities as well as critical dependencies. Please note that snow-free conditions should be planned for field verification work. Field work should allow for aerial assessment of each line and ground truthing on a significant portion of the seismic lines in various site types. The aerial and ground assessment will be used to determine if the segment meets the requirements as per the Framework in Tables 4, 5 and 6.

The work plan and project budget should be clearly linked.

(f) Describe a plan to include local Indigenous communities into the scope of work. The successful applicant will be required to provide a final metric that includes the dollar value spent on Indigenous-owned companies or inclusion efforts.

(g) Describe the approach for project management and quality control to confirm that:

(i) The development of the Operational Plan for linear restoration follows the guidance provided in the Framework and will meet the stated restoration objectives as per Tables 4, 5 and 6 in the Framework.

(ii) Treatment prescriptions align with common and linear-adapted silvicultural practices and deactivation techniques to mitigate site limiting factors and sufficiently block human and animal movement.

(iii) Field verification is the basis for treatment prescriptions.

In accordance with the Framework, the accuracy of all submitted data will need to be verified using the following process prior to submission. An approach for quality control of data collection and GIS file creation should be proposed that includes the following:

(iv) Allowable data entries and fields are listed in the Framework's standardized Templates; and,

(v) Field crew and supervisors will be expected to quality check the data that they have collected prior to submission to FRIAA.

(h) Briefly describe the required permits, licences, agreements, and regulatory approvals that will be required to undertake the project. It will be the responsibility of the successful applicant to obtain all regulatory approvals and/or third-party agreements, and to maintain the records of these approvals for an appropriate period of time following the completion of the project.

(i) Applicants are responsible for stakeholder consultation and engagement as may be required to develop the Operational Plan. Stakeholders include specifically, but are not limited to: forest tenure, surface and mineral (subsurface) rights holders, and local Indigenous communities and trappers. Describe your stakeholder consultation and engagement approach, setting out the expected requirements and timelines.

Applicants can refer to the Landscape Analysis Indigenous Relations Tool that is part of the Government of Alberta's Landscape Analysis Tool ("**LAT**") to inform their consultation with and engagement of stakeholders. More information can be found at: https://www.alberta.ca/proponent-led-indigenous-consultations.aspx.

(j) The applicant is required to incorporate access requirements on proposed treatment lines with the current Land Standing listed trapper(s) and the local Indigenous communities with traditional land use (TLU) interests. The applicant may potentially modify the planned treatments to ensure that such access (i.e. leaving 2m of line width accessible on as few lines as possible) is accommodated in the Operational Plan.

(k) Briefly describe your approach to safe work practices. The successful applicant will be required to submit a Certificate of Recognition ("**COR**"), a Small Employer Certificate of Recognition (SECOR) or equivalent documentation upon project grant agreement completion.

(l) Provide a maximum price to complete the proposed project, for developing an Operational Plan (with multiple compartments). Provide a cost breakdown with sufficient details to demonstrate an understanding of the various steps to complete the project.

Generalized administration fees, contingency fees and "percentage markup" will not be accepted (build this into your maximum price).

GST may be claimed on subcontractors and third-party invoices, however applicant resources are covered by grant funding (no GST is charged).

Outline the hours, rates and third-party expenses, including the following items:

(i) Project Management;

(ii) Safety management;

(iii) Permitting / regulatory;

(iv) Field work (ground and aerial);

(v) Development of Operational Plan;

(vi) GIS/data/mapping work;

(vii) Quality control (field, planning and data);

(viii) Reporting; and,

(ix) Travel (ground/air), meals and accommodations;

(m) Include a description of the leverage by way of in-kind contributions of labour, equipment or other resources by the applicant. Previously completed work, or projects being funded under other FRIAA programs are not considered "in-kind".

(n) The successful applicant will be required to submit Progress Reports to FRIAA as well as a Final Outcomes Report. Propose the schedule by date for these reporting intervals. The project is expected to have at least two written interim reports (at deliverable milestones including at the initiation of the field assessment and with the completed draft Operational Plan) and a Final Outcomes Report in FRIAA's progress reporting format. This template is available on FRIAA's website.

Note: Project deliverables must include an operational plan (in MS Word and PDF formats), GIS data (in shapefile or geodatabase formats), and GPS-referenced field photos.

(o) At the Progress and Final Reporting intervals, Expense Claims may also be submitted (with supporting documentation such as timecards, subcontractor invoices, disbursement receipts).

Indicate the preferred amount of each payment (a minimum of 20% of the total approved grant amount will be paid with the Department's approval of the final deliverables and upon FRIAA's acceptance of the Final Outcomes Report and Expense Claim.) Payment amounts should link with the work plan milestones and project budget amounts.

Note: Grant funding will be provided incrementally and will be dependant on the submission of Progress Reports and supported expense claims. Timelines set out in the Project Grant Agreement are for guidance and do not automatically trigger payments.

(p) The successful applicant will be required to schedule and lead a project kick-off meeting with FRIAA and the Department (virtual is acceptable) prior to initiating field work.

(q) The outcomes and deliverables are listed below. Describe the applicant's understanding of the expected outcomes and deliverables for the proposed project. Note that simply "copying and pasting" the list set out below will not be adequate:

(i) An Operational Plan For Linear Restoration meeting the standards described in the Framework and the Template. **Approval by Alberta**

Environment and Protected Areas of the Final Operational Plan and GIS data will be required prior to the final project payment;

A. During the planning process, the applicant may need to subdivide the Ranges into compartments (about 100-200 treatment km per compartment) for operational implementation purposes, using landforms and access as divisional lines;

B. Prescriptions should provide treatment continuity for a minimum of 100 m in length; and

C. Provide GPS locations of observed cabins and if possible, registered trapper cabin status;

(ii) Maps as per the Operational Plan Template (V 2.0);

(iii) Supporting shapefiles or geodatabase with data fields as per the Template;

(iv) Clean GIS data (no slivers);

(v) Ground truthing locations (GPS point, photo, field notes) and aerial segment GPS-referenced photos.

(r) Describe what the applicant sees as the critical success factors in the delivery of the proposed project.

(s) Briefly describe the applicant's experience and expertise as directly-related to the proposed project and its delivery components, that demonstrates the applicant's capacity to develop an operational plan for a caribou habitat restoration program.

(t) Provide a brief description of the experience and qualifications for key team members (including the project manager, lead planner, GIS specialist, field crew lead, silviculture expertise, and heavy equipment expertise) and specify their role and responsibilities in the project delivery.

5. PROPOSAL EVALUATION

5.1 Proposals will be evaluated based on the Proposal Adjudication Criteria and the requirements set out in this RFP, the completion of the application form and template, as well as available funding.

5.2 Only those Proposals that will result in funds being expended directly on a specific project deliverable and undertaken by the applicant will be considered. Grant funding on an approved project is limited to the amount of funding available for this RFP and the amount of funding specified for the deliverables as set out in a fully executed Project Grant Agreement.

5.3 FRIAA reserves the right to consider additional criteria in the evaluation of Proposals.

5.4 FRIAA will in its sole discretion determine which Proposal will be accepted and approved for funding under the CHRP.

5.5 FRIAA is not obligated to accept or approve any Proposal for funding or give reasons for the selection or rejection of any Proposal or to allocate funds under the CHRP in respect of any Proposal. All decisions made by FRIAA in respect of any or all Proposals, project selections and funding allocations are final and binding.

5.6 Please note that by submitting a Proposal and signed application, the applicant accepts and agrees to be bound by all of the terms and conditions set out in this RFP and the applicant is the organization, company or individual that will be responsible for all aspects of the project and that the applicant will enter into a Project Grant Agreement with FRIAA.

5.7 FRIAA will determine how much funding may be available for projects and will be making allocations based on the available funding level.

5.8 All matters of administration and accountability for a project shall be the sole responsibility of the applicant.

5.9 **Proposal length should not exceed 18 PDF pages and must follow the provided template**.

6. PROPOSAL ADJUDICATION CRITERIA

6.1 Proposals submitted to FRIAA shall be ranked based on the following criteria and the Proposal Requirements set out in Section 4.

6.2 Proposals must contemplate the carrying out of one or more Eligible Activities as defined in the CHRP. Any activities related to the following items are not eligible for funding:

(a) facility construction, improvement or operations;

(b) product research and development;

(c) road construction, repair and maintenance; and

(d) the purchase of any capital assets.

6.3 The expenses set out in the Proposal must be reasonable in all the circumstances and must not exceed the fair market value of the goods and services being provided.

6.4 The applicant must be able to complete the proposed project economically and efficiently, and in considering this criteria, FRIAA may take into account the following:

(a) The applicant’s proximity to the location of the proposed project;

(b) The applicant’s experience in performing such projects;

(c) Whether the applicant has, in the past, successfully (on time, on budget and with high quality results) completed projects funded by FRIAA.

6.5 The Proposal must not be contrary to the provisions of relevant regulation or legislation or the objects of FRIAA, or FRIAA's bylaws, including but not limited to the following:

(a) any work that, in the opinion of FRIAA, a responsibility of a disposition holder or constitutes a subsidy to the forest industry, energy industry or other industry; and

(b) must not, in the opinion of FRIAA, have a significant adverse impact on other forest resources or the environment as a whole.

6.6 The applicant must be able to complete the proposed project economically and efficiently and in considering this criterion, FRIAA may take into account the applicant's experience in performing such projects, the availability of resources to the applicant, and if applicable, whether the applicant has in the past complied with the *Forest Resources Improvement Regulation* and other requirements and obligations as determined by FRIAA including making prompt payment of all required timber dues and FRIAA dues and fees.

6.7 Proposals that leverage of FRIAA funds with funds from other sources to complete the proposed project or associated with the proposed project will be favoured.

7. CARIBOU HABITAT RECOVERY PROGRAM OUTLINE

7.1 The full text of the Program Outline for the CHRP is available on FRIAA's website (www.friaa.ab.ca).

8. LEGAL NOTICE

8.1 By submitting a Proposal, you confirm that you have read, understand and accept the information contained in this RFP and, that each of you, the applicant and all individuals and entities that collaborate or are otherwise involved in the preparation of the RFP or the delivery of the proposed project ("**Project Partners**") agree as follows:

(a) FRIAA may at any time withdraw, suspend, cancel, terminate, amend or alter all or any portion of this RFP, including but not limited to the Proposal Requirements and the Proposal Adjudication Criteria.

(b) FRIAA reserves the unqualified right to accept or reject any or all Proposals for any reason. FRIAA is not required to accept any Proposals nor is it required to accept any Proposal for funding.

(c) FRIAA's evaluation of the Proposals may be based on, but is not in any way limited to, the criteria set out in this RFP. FRIAA may consider any criteria determined by FRIAA to be relevant to FRIAA's mandate, regardless of whether such additional criteria have been disclosed to the applicant.

(d) No conduct, act or omission of FRIAA, or its directors, officers, consultants, project advisors, members, agents, servants and their respective successors and assigns (collectively the "**FRIAA Parties**") other than a written notice to the applicant signed by an authorized person for FRIAA, will constitute an acceptance of a Proposal.

(e) Proposals that do not comply with the requirements described in this RFP may be rejected in whole or in part or not considered. FRIAA reserves the unqualified right to accept or reject a non-compliant Proposal.

(f) This RFP is an invitation for Proposals only. It is not an offer and the submission of a Proposal does not create a contract or agreement of any kind between FRIAA and the applicant.

(g) Acceptance of a Proposal does not create a binding contract between FRIAA and the applicant. FRIAA shall not be obligated in any manner whatsoever to any applicant until a written agreement between FRIAA and the applicant ("**Project Grant Agreement**") has been duly executed relating to an approved Proposal.

(h) As between the parties, the Proposal and all documents and materials you submit to FRIAA in connection with the Proposal and this RFP and all intellectual property in and to the foregoing are the exclusive property of FRIAA immediately upon delivery to FRIAA. Intellectual property developed during the course of the project will be addressed through the Project Grant Agreement.

(i) Subject to subparagraph 8.1(j) below, you, the applicant and any Project Partners will keep this RFP confidential and will not use, reproduce or distribute it, any portion of it, or any data, information, drawings, or specifications included in or provided with it except as necessary to prepare a Proposal to FRIAA in response to it or to apply for additional third party funding for the project.

(j) You, the applicant and any Project Partners will keep confidential all source data, information, drawings, or specifications provided by the Department whether in electronic format (e.g. Shapefile) or otherwise except as necessary to prepare a Proposal to FRIAA in response to this RFP or in the event of a successful application the deliverables specified in the RFP requirements.

(k) You, the applicant and any Project Partners will not make a claim against FRIAA or the FRIAA Parties for any reason whatsoever relating to this RFP. You are undertaking the expenditures required to prepare and submit a Proposal entirely at your own risk, and you waive any right and release FRIAA and the FRIAA Parties from any demands, liability, claim or recovery for costs, expenses, or damages incurred whatsoever and howsoever arising out of or relating to this RFP or any Proposal prepared in response to it, whether such right or claim arises in contract, negligence or otherwise.

(l) FRIAA takes no responsibility for the accuracy of the information supplied during this RFP process by FRIAA or the FRIAA Parties.

(m) Neither FRIAA nor any of the FRIAA Parties will have any liability whatsoever to you, the applicant, or any Project Partners, or any of them, in connection with this RFP or any Proposal prepared in response to it.

(n) Upon acceptance of a Proposal by FRIAA, the applicant will be required to enter into a Project Grant Agreement with FRIAA, on substantially the same terms and conditions contained in the Project Grant Agreement provided during the RFP or available upon request.

9. INFORMATION SESSION

9.1 FRIAA will hold an Information Session to address questions that may arise with respect to this RFP on **July 8, 2024**. Contact details, the time of, and how to participate in the Information Session will be posted on FRIAA's website. Interested applicants are strongly encouraged to participate. Applicants are encouraged to request clarifications and **submit any questions in writing** regarding this RFP, **by 4:00 p.m. on July 5**, to admin@friaa.ab.ca.

9.2 **Follow-up questions** arising from the information session and submitted in writing **will be accepted until 4:00 pm** local Edmonton time on **July 18, 2024**. Answers will be posted to the FRIAA website within 24 hours after receipt and will not be accepted at any time thereafter.

10. PROPOSAL SUBMISSIONS

10.1 Proposals may be submitted on FRIAA's website portal at: https://friaa.ab.ca/program-submissions/. In the Submission Portal, select **FRIAA - CHRP RFP June 2024 Operational Planning**" as the application opportunity.

10.2 Only documents formatted in PDF will be accepted.

10.3 Proposal submissions must include a completed "Application Form" and a completed "Application Template" in the format provided.

10.4 Proposals sent directly to any FRIAA or Government of Alberta representatives will not be accepted.

11. DEADLINE FOR PROPOSALS

11.1 Only those **Proposals received prior to 4:00 p.m.,** local time as observed in the City of Edmonton, on **July 24, 2024** will be accepted for evaluation. Proposals received any time thereafter will not be accepted for evaluation.

11.2 FRIAA is not responsible for Proposals that are not received as the result of technological issues, attachment size or any other logistical barrier which may impede electronic submission.

12. NEXT STEPS

12.1 **Project award is expected to be about mid-August 2024**.

12.2 FRIAA's preference is to have the project completed with draft deliverables submitted by October 15, 2024 and final deliverables submitted no later than November 15, 2024.

APPENDIX "A"

MAP 1) Caribou Range Overview Map (orange area highlights the operation plan areas)

APPENDIX "B"

Table 1) Framework Section 3.3 Update Treatment Actions

Action	Definition	Establishment Monitoring Criteria
Treatment	A prescription for site modification on given legacy seismic line that will help achieve the programs' targets and objectives over time. Treatments can include prescriptions for tree planting including species type, density recommendations, site preparation (if necessary), line deactivation or even leave to grow.	Treated areas will be evaluated against the specific targets identified in Monitoring Targets
Modified Treatment	A prescription that will maintain access to existing legacy seismic lines at a reduced width and line of site to accommodate existing use for trapper access or access by Indigenous community members.	Modified treatment areas will be evaluated against the specific targets identified in Monitoring Targets
Advanced Regeneration	Areas with existing tree regeneration of acceptable species that meet or exceed the Establishment Monitoring Target and sufficient density. Advanced regeneration areas need to be segments of at least 50m in length	Advanced regeneration areas will be evaluated against the specific targets identified in the Monitoring targets
Partially Regenerated	Areas that don't meet the criteria for Advanced Regeneration but the regeneration has significant potential to achieve the Establishment Target if one or more treatment actions are prescribed	Partially Regenerated areas will be evaluated against the specific targets identified in the Monitoring targets
Project exclusions	Existing dispositions Inoperable areas	Project exclusions will be identified in the operational plan and will not be included in subsequent monitoring.