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# Request for Qualifications

Research & Analytical Consultant(s)

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## 1.0 Introduction

**Petroleum Labour Market Information (PetroLMI)**, a division of Energy Safety Canada, is seeking the services of a **Research & Analytical Consultant(s)** to plan and conduct research, analysis and report writing for labour market information report projects from February 2018 through to December 2020.

This Request for Qualifications (RFQ) is designed to provide detailed information that will enable your firm to respond specifically to the consulting requirements including: scope, objectives, project activities and key responsibilities. RFQ submissions will be accepted from single business entities or from a consortium of firms. However, if the successful proponent is a consortium of firms or consultants, the lead firm must be identified in the RFQ.

**RFQ responses are due by 11:59 p.m. MST on January 31, 2018.**

## 2.0 About PetroLMI

The Petroleum Labour Market Information (PetroLMI) division of Energy Safety Canada (a merger of Enform and Oil Sands Safety Association) serves a unique role as a leading resource for labour market and occupational information and resources regarding Canada's oil and gas industry.

PetroLMI's mandate is to collaborate with industry, government, educators and training agencies to provide timely, relevant and credible petroleum labour market intelligence and insights, as well as occupation profiles and tools for effective workforce and career planning.

PetroLMI generates the following labour market and occupational information and resources:

- **Labour Market Outlooks:** Using a proprietary labour market modelling system, these outlooks are produced annually and provide analysis and insight regarding longer-term employment requirements, hiring projections and labour supply for Canada's oil and gas industry.
- **Workforce Trends and Insights:** Using data collected from industry and other sources, these reports explore current or short-term workforce conditions and trends within the industry. These could include workforce demographics and potential supply pools, recruitment and retention challenges including in-demand occupations, labour market statistics, etc.
- **Career profiling:** With the objective of reducing barriers to employment, PetroLMI develops profiles of current and future occupations within the petroleum industry that include working environments, education, skills and training requirements, as well as specialized tools to map career paths and measure transferability of skills and qualifications.

With the support of industry, PetroLMI has developed the [Careers in Oil + Gas](#) website to provide its resources and key industry information to those in workforce or labour market program planning or who are planning and pursuing careers in the oil and gas industry. Informed decision-making advances the development of a sustainable, skilled and productive oil and gas workforce in Canada.

### 3.0 Background, Objectives and Scope

PetroLMI is sourcing consultants with the objective of creating a Standing Offer List of qualified Research and Analytical consultant(s) to contract for one or more projects as required commencing February 2018 through December 2020. The Standing Offer List will be reviewed on an annual basis and updated if necessary with subsequent RFQ processes.

The following activities may be required:

- In collaboration with the PetroLMI project team, develop a work plan and schedule to ensure timely delivery of outputs and objectives of project(s)
- Conduct research and analysis that contribute to addressing strategic workforce issues within Canada's oil and gas industry. Activities can include, but are not limited to:
  - Reviewing and analysing secondary research;
  - Conducting market research, such as environmental scans, competitor analysis, audience identification, product/service testing, etc.;
  - Conducting surveys and/or interviews;
  - Conducting meetings for consultation purposes and analysing information collected;
  - Developing key messages for research reports;
  - Developing presentations and other materials for the purpose of delivering and/or facilitating meetings; and
  - Developing, and possibly conducting, site visits to present project materials to a specific audience.
- Provide required copies (print and electronic) of all drafts and final deliverables.
- Maintain a detailed record of all stakeholder participation during the course of the project(s) (including all research, e.g. interviews, focus groups, etc.) and provide regular reports to the PetroLMI project manager so that sector in-kind contributions can be tracked.
- Attend regular status meetings and provide progress reports with the PetroLMI project team.
- In collaboration with the PetroLMI project team, participate in project reviews to evaluate successes and areas for improvement.

Key PetroLMI report commitments between February 12, 2018 and December 4, 2020 include:

- Two Labour Market Outlook reports (Q1 2019 and Q1 2020)
- Workforce/demographic trends research reports or article series (twice per year)
- Survey reports or fact sheets (twice per year)

#### Examples of deliverables

- Draft and final versions of analytical reports and/or fact sheets with supporting documentation.
- Environmental scans and market research.
- Power point and other presentations and supporting materials for stakeholder consultations and project-specific meetings.

*Note: PetroLMI maintains document standards and a writing style guide that must be followed for all materials. Copies will be provided to all successful consultants.*

The estimated total value of work among project(s), and among selected consultant(s) during the timeline outlined will be **approximately \$280,000 plus GST**. As other related project work is identified, this amount may be adjusted.

## 4.0 Consultant Selection Process

Consultant Selection Process	Timeline for Completion
RFQ posted/issued	January 9, 2018
Questions from interested bidders submitted/received	January 12, 2018
Responses to submitted questions circulated and posted on PetroLMI's blog site	January 15, 2018
RFQ responses submitted/received	January 31, 2018
Consultants short-listed by selection committee	February 8, 2018
Short-listed consultants contacted for presentation/interview schedule	February 9, 2018
Presentations/interviews from short-listed consultants and final selection	February 19-21, 2018
Notify selected consultant(s) and advise next steps	February 23, 2018

The Selection Committee will assess each RFQ response against an agreed upon set of evaluation criteria. Firms selected to present to or be interviewed by the Selection Committee will be notified of the logistics by PetroLMI. Participation in the presentations/interviews will be the sole financial responsibility of the consultant(s) and will not be reimbursed from the project budget.

Qualified consultants will be sent a confirmation letter from PetroLMI. Qualified consultants will be contacted to discuss and agree on proposed activities, work plans and budgets for specific projects. A contract will be negotiated for the work outlined in each project.

## 5.0 RFQ Requirements and Evaluation Criteria

Responses submitted to PetroLMI should not exceed 15 pages in length. The following are required elements for the response:

- A one or two page overview of Canada’s oil and gas industry and potentially the broader energy sector, specific labour market issues it faces and how this project can help address those issues.
- Summary of qualifications, ensuring the following minimum requirements are met:
  - Relevant education and/or certification;
  - At least five years of experience conducting research and analysis;
  - Experience working with teams and committees in a collaborative manner;
  - Experience in and understanding of the oil and gas industry;
  - Working with predefined deadlines and delivery standards;
 Note: Bilingualism (English and French) is an asset.
- Identification of any potential risks that your team may foresee in carrying out research and analysis activities and possible actions to mitigate these risks.
- Identification of measures that will be taken by your team to ensure the highest level of quality in the production of reports, documents, correspondence and communication with project participants and PetroLMI.
- Key contact information:
  - One key contact name for all correspondence
  - List of team members, work locations, area of expertise and specific role/tasks.

Each RFQ response/proposal will be measured against the following criteria:

Criteria	Weighting
1. Consulting Firm’s Capacity to Carry Out Project within Target Timelines	30%
2. Experience and Understanding of Canada’s Oil and Gas Industry and its Workforce Challenges	25%
3. Experience Undertaking Similar Projects	20%
4. Consultant Hourly Rate	15%
5. Overall Cohesiveness and Presentation of Response to RFQ	10%
<b>TOTAL</b>	<b>100%</b>

\*Please detail hourly rates if these vary for each key role (e.g., senior researcher, junior researcher, analyst, project lead, etc.). Consultant’s travel costs to attend meetings and to conduct research must be included in the estimated budget. This fee includes the distribution of research tools (e.g., surveys)

used in the research phase of the project. For example, if the consultant(s) chooses to conduct a mail survey, they are responsible, both financially and logistically, for its distribution.

**RFQ responses are due by 11:59 p.m. MST on January 31, 2018. Please e-mail an electronic PDF copy of your official submission including company name and RFQ Research & Analytical Consultant(s) in the subject line to: [anna.kottsova@energysafetycanada.com](mailto:anna.kottsova@energysafetycanada.com)**

## 6.0 Cancellating/Reissuing RFQ

PetroLMI reserves the right to cancel, alter or reissue the RFQ. The RFQ is not a contract, or offer to enter into a contract, but an RFQ for the supply of service to PetroLMI/Energy Safety Canada. PetroLMI may reject any and all RFQ responses without further questions or redress from any respondents. PetroLMI reserves the right to accept or reject RFQ submissions in whole or in part, to discuss different or additional terms to those included in the RFQ or in any official submission, or to amend or modify any term in this RFQ.

## 7.0 Additional Information

Contracts may be either fixed fee for accepted completed deliverables or an hourly rate. The type of contract required will be determined by PetroLMI. The successful RFP bidder will be required to adhere to the following contractual requirements.

Note: This is a partial list only as it provides information to potential bidders regarding contracting expectations of PetroLMI and does not represent a contractual agreement in whole or in part.

### ASSIGNMENT AND SUBCONTRACTING

- Proposals must be submitted under one lead Consultant if subcontractors are being included.
- Identification of the project lead: If the submission is from a consortium of firms or consultants, the submission must identify the lead firm and the project lead from that firm. It must also detail how the consortium will operate. In the case that the successful bidder is a consortium of firms or consultants, PetroLMI will enter into a contract with the lead firm/consultant only.
- Written request to, and permission from, PetroLMI are required for substitutions of key project team members.

### INTELLECTUAL PROPERTY AND COPYRIGHTS

- Ownership of any work, information, records or materials developed or produced under the contract shall become the sole property of PetroLMI.

### CANADIAN LABOUR AND MATERIALS

- The contractor shall use Canadian labour and materials in the performance of the work to the extent they are procurable.

