PTAC

Alberta Upstream Petroleum Research Fund

PTAC

26-ERPC-RFP-01

Disturbance Monitoring and Assessment for Active Management: Remote Sensing and Digital Decision Tools to Assess Disturbance Recovery and Trajectory

BUDGET: $125,000[1]

RFP PUBLICATION DATE: MAY 1, 2026

PROPOSAL SUBMISSION DEADLINE: JUNE 17, 2026 (5:00 PM MT)

[1] Budget is an upper cap.
Proponents are encouraged to submit competitive pricing.

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1. Background & Rationale

A persistent challenge for restoration planning and assessment is determining how disturbance condition changes over time and how to define meaningful recovery states for operational and regulatory decision-making across landscapes. The Alberta Upstream Petroleum Research Fund (AUPRF) has identified a persistent practical challenge for restoration planning and assessment: to assess disturbance condition and recovery along a trajectory, identifying when disturbance effects are materially reduced and how recovery progresses over time, including how to distinguish natural recovery trajectories from features that remain ecologically stagnant and may warrant intervention.

Remote sensing (including LiDar and machine-learning approaches) can map vegetation recovery at scale, but producers require indicators that are validated, uncertainty-aware, auditable, and integrated into day-to-day workflows. This challenge is not binary; disturbance recovery occurs along a trajectory, requiring clear identification of intermediate states and decision-relevant milestones (i.e., “landing points”) that support practical management, monitoring, and reporting.

This RFP aims to develop and implement practical monitoring and assessment methods that leverage remote sensing and complementary digital tools to support disturbance assessment, recovery classification, and decision-making for active management, with clear performance expectations, validation strategies, and integration into operational workflows. Remote sensing (including LiDar and machine-learning approaches) is increasingly capable of mapping regeneration at scale. Still, indicators require validation, explicit uncertainty characterization, and integration into repeatable decision and reporting processes.

Proponents should identify opportunities to leverage or benchmark against existing validated models where appropriate. Awareness of and alignment with existing work, clearly identifying how the proposed approach builds upon or differentiates from existing models and avoids duplication is preferred. *This work requires particular emphasis on usability, transparency, and operational deployment of final products.*

This RFP explicitly includes both (1) linear disturbances (e.g., seismic lines, roads, pipelines, access trails) and (2) polygonal disturbances (e.g., well pads, landings, borrow areas, facilities, cleared/graded sites, and other area-based footprints). The intent is to develop monitoring and assessment approaches that can be applied consistently across disturbance geometries and types, while remaining practical for producers. *Preference may be given to approaches that utilize open-source tools or widely accessible platforms to maximize adoption.*

2. Benefits to Alberta Producers (AUPRF Funders)

Use of tools and processes to deploy a producer-operational recovery classification and monitoring workflow that enables consistent, defensible assessment of disturbance condition across a recovery trajectory, supporting staged decision-making for restoration, access management, and monitoring/reporting.

- Scalable, repeatable disturbance monitoring across linear and polygonal features using remote sensing and complementary digital tools
- Outcome-based, practical indicators that help determine recovery status and endpoints (including emphasis on functional recovery indicators, not only survival metrics)
- Defensible classification outputs with validation and uncertainty reporting suitable for stakeholder expectations for evidence quality and, where relevant, regulatory acceptance
- Reduced monitoring burden through repeatable, auditable workflows and clear QA/QC, enabling consistent application across operators and landscapes
- Practical, user-ready tools enabling proponents to assess restoration trajectory and disturbance condition using their own data
- Improved understanding of how disturbance-related effects (e.g., buffers or functional impacts) change over time as restoration progresses

3. Project Objectives

a) Define operationally relevant recovery states and trajectory-based endpoints for disturbance condition, applicable across landscapes and regulatory contexts, applicable to both linear and polygonal disturbances
b) Include intermediate classifications (e.g., treatment completed, monitoring ongoing) to support staged decision-making including clearly defined intermediate states ("landing points") to support staged decision-making and tracking of restoration progress
c) Develop *and apply* a recovery classification framework that distinguishes trajectories consistent with natural recovery from features that remain stagnant and may warrant intervention including characterization of recovery trajectories and identification of features that diverge from expected recovery pathways
d) Develop a practical, user-ready decision-support tool or workflow that enables proponents to input their own data and assess disturbance condition and recovery trajectory in a consistent and repeatable manner
e) Specify performance expectations and validation strategy for indicators and classification outputs, including uncertainty/error characterization
f) Provide integrated outputs into producer-ready workflows (e.g., GIS-ready products, documented decision logic, repeatable processes) suitable for operational adoption
g) Ensure outputs are aligned with operational, stakeholder, and regulatory expectations, supporting potential acceptance and application in decision-making processes

h) All outputs must be auditable and reproducible

4. In Scope

- Primary development will focus on conventional operations; however, approaches should not preclude applicability to other asset types where feasible
- Monitoring and assessment of disturbance condition and recovery across linear and polygonal disturbance types, including, but not limited to, woodland caribou–relevant contexts and including applicable subregional planning areas
- Assessment of how disturbance-related effects (e.g., buffers, functional impacts) change over the restoration trajectory
- Remote sensing approaches for mapping disturbance and recovery at scale, paired with complementary data sources where appropriate (e.g., field calibration/verification datasets)
- Development of indicators and classification logic that support decision-relevant endpoints and repeatable application.
- Validation, QA/QC, and uncertainty reporting suitable for consistent use and stakeholder expectations for evidence quality
- Producer-ready implementation outputs (GIS layers, metadata, documentation, and workflow description), including workflows that can be executed using open-source or commonly available software and user-provided data
- Consideration should be given to integration with or development of a publicly accessible database of treated disturbances to support transparency, coordination among operators, and tracking of restoration activities
- Approaches should be applicable across multiple land-use and regulatory contexts where feasible
- Proponents must demonstrate how proposed methods leverage, complement, or improve upon existing approaches and datasets

5. Out of Scope

- Direct wildlife management actions on animals (e.g., predator control programs, animal handling/capture) as primary project activities
- Policy advocacy as a primary deliverable (technical monitoring/assessment methods and tools are required)
- Outputs that cannot be operationalized by producers (unclear decision relevance, non-repeatable methods, missing validation/uncertainty characterization)

6. Specific Deliverables

a) Disturbance Recovery Classification Framework
   Operational definitions and a classification scheme for recovery status/endpoints applicable to linear and polygonal disturbances
b) Indicator Suite + Measurement Protocols
   A defined set of indicators with clear measurement specifications and documented limitations, aligned with the classification framework and producer usability
c) Validation + Uncertainty Package
   Validation design and results, including uncertainty/error characterization and QA/QC guidance for operational use
d) Producer-Ready Digital Tool and/or Workflow Package
   GIS-ready layers and metadata, documented decision logic, and a repeatable workflow description enabling consistent application that enables proponents to input their own data and independently assess disturbance condition and recovery trajectory using repeatable and auditable processes
e) Demonstration / Pilot Application
   A pilot package demonstrating how outputs translate into active-management decisions, including example classification outputs and interpretation and including demonstration of trajectory-based classification and staged decision-making outputs.
f) Implementation Guidance
   A concise “how-to-use” briefing note and reporting language/templates designed for producers

7. Success Criteria

a) **Operational clarity**: Clear, usable classification of disturbance condition across a recovery trajectory, including defined intermediate states and endpoints, applicable to both linear and polygonal disturbances, recognizing that criteria may differ between disturbance types based on ecological function, as linear and polygonal disturbances are very different in how wildlife (i.e., caribou and predators) uses them
b) **Scalability & repeatability**: Remote sensing/digital tools support timely, repeatable monitoring across landscapes
c) **Defensibility**: Validation and uncertainty reporting are explicit and suitable for evidence-quality expectations
d) **Producer usability**: Deliverables are producer-ready and integrate into practical workflows (GIS outputs, documented logic, implementation guidance)
e) **Practical usability:** Tools and workflows can be applied directly by proponents with minimal reliance on specialized expertise

f) **Applicability**: Outputs are relevant across disturbance types, landscapes, and evolving regulatory contexts
g) **Regulatory relevance:** Outputs demonstrate potential alignment with regulatory and stakeholder expectations
h) **Non-binary clarity**: Approach clearly demonstrates progression of recovery rather than relying solely on binary thresholds

8. Intended Use / Application of the Project Deliverables

The outputs of this project are intended to support:

- Restoration planning and prioritization
- Access and land-use management decisions
- Monitoring and reporting to regulators and stakeholders
- Improved consistency and defensibility in disturbance assessment across operators

8) Proposal Requirements

- Presents information on project team and relevant qualifications/experience
- Presents a clear understanding of project objectives and deliverables
- Presents methodology, work plan, timeline and budget. Note: $125,000 is the upper cap and proponents are encouraged to submit competitive pricing
- Provides proof of insurance
- Please refer to INSTRUCTIONS FOR PROPOSAL SUBMISSIONS for more information on Proposal Requirements

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AUPRF 2026 Request for Proposals

INSTRUCTIONS FOR PROPOSAL SUBMISSIONS

MAY 2026

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Instructions for Proposal Submissions
AUPRF 2026 RFPs

1 Purpose & Scope

These instructions apply to all competitive solicitations funded by the Alberta Upstream Petroleum Research Fund (AUPRF) and administered by PTAC Petroleum Technology Alliance Canada. They define how Proponents must prepare and submit proposals, how proposals are evaluated, the timelines for decisions and notifications, and key commercial and legal terms applicable to AUPRF-funded projects.

2 Submission – Content Requirements

2.1 Proponent & Company Information

- Legal name and address
- Primary contact name, title, email, and phone
- Brief company overview and relevant services

2.2 Technical Proposal

- Understanding of the problem statement and scope
- Proposed methodology and approach
- Work plan, milestones, and schedule
- Team composition; max 2-page bios/CVs with roles and expertise

2.3 Financial Proposal

- Itemized cost breakdown (e.g., labour categories and rates, materials, travel, subcontractors)
- Proposed milestone-based payment schedule (payments tied to deliverables)
- Leveraged funding

2.4 Formatting and Page Limits

Unless otherwise specified in a particular RFP, no strict page limits apply; include the content necessary to enable a thorough assessment.

3 Submission — Method & Logistics

Submit by email to info@ptac.org with subject line: *AUPRF – RFP ID – Proponent Company Name*. **Proposals submitted by other means will not be accepted.**

- Deadline: Proposals must be received on or before the RFP deadline indicated in each RFP document; late submissions will not be considered.

- File format: A single combined PDF is preferred, plus any required spreadsheets or forms specified in the RFP.
- Validity: Proposals must remain irrevocable and open for acceptance for 90 days from the submission deadline.
- Questions & FAQs: Refer to the AUPRF call for proposals landing page and any RFP-specific instructions for updates and clarifications.

4 Eligibility, Legal & Commercial Terms

- PTAC reserves the right to accept or reject any Proposal, in whole or in part, and to cancel or amend an RFP without liability.
- Proponents are responsible for all costs associated with preparing and submitting their Proposals.
- Confidentiality applies to information provided by PTAC; Proponents may be required to sign a non-disclosure agreement. Proposals will be kept confidential and will be accessed only by evaluators.
- Intellectual property (IP) arising from AUPRF projects may be owned by AUPRF funders, or AUPRF funders receive a royalty-free operational use right. No other IP ownership or sharing options (if IP is being generated) are acceptable.
- Minimum insurance: Commercial General Liability (CGL) of $5,000,000 and Professional Liability of $2,000,000.
- Disclosure of intent to subcontract and any actual or potential conflicts of interest is required.
- Governing law: Province of Alberta, Canada.

5 Evaluation Criteria & Process

5.1 Scored Criteria and Weights

Criterion	*Weight*
Technical Approach	30%
Relevant Experience	30%
Cost	25%
Leveraged Funds from Other funders	5%
Team Qualifications	10%

5.2 Screening & Completeness

Proposals are first screened for completeness and compliance (deadline, required sections, and required disclosures). Incomplete or non-compliant Proposals may be removed from further consideration at PTAC's discretion.

5.3 Committee Review, Scoring & Deliberation

The relevant AUPRF technical committee reviews Eligible Proposals. Committee members score Proposals using the standardized scoring sheet before a deliberation meeting, where compiled results are discussed, and recommendations are confirmed.

PTAC may request clarifications, additional information, or presentations from Proponents to support evaluation before final ranking.

6 AUPRF Review & Communication Timelines[1]

The following applies to AUPRF RFPs for **Ecological Research Planning Committee (ERPC), and Reclamation Remediation Research (RRRC)**, unless a specific RFP states a different schedule:

Step	*Date*
1. **RFP Release**	May 1, 2026
2. **Submission of Questions**	May 22, 2026
3. **Answers to Questions Posted** on PTAC Website	May 29, 2026
4. **Proposal submission deadline**	**June 17, 2026** **5 pm Mountain Time**
5. **Decision ratification**	July 30, 2026, or sooner
6. **Award notifications**	July 2026
7. **Target project start**	Summer 2026 (unless otherwise specified)

7 Communication

- All communications by the proponent to PTAC should be directed to info@ptac.org and AUPRF2026 RFPs should be included in the subject line.
- PTAC will notify the Proposal's primary contact by email of the outcome (award or non-award).
- Unsuccessful Proponents may request high-level feedback on strengths and areas for improvement.
- Public Communications: PTAC/AUPRF may publish award highlights after contract execution.

8 Contracting, Payments & Reporting

- A standard AUPRF Funding Agreement will be issued to successful Proponents for review and execution.
- Payments are quarterly milestone-based and tied to accepted deliverables, as specified in the Funding Agreement.
- Executed agreements are retained in the AUPRF contracts repository managed by PTAC.

[1] AUPRF 2026 RFPs for Well Decommissioning Research (WDRC), Water Innovation Planning (WIPC), and Air Research Planning (ARPC) **follow a different timeline and deadline**.

9 Compliance & Reserved Rights

PTAC may amend or cancel an AUPRF RFP at any time; any changes will be communicated to all prospective Proponents. Proponents must comply with all instructions, including confidentiality, insurance, subcontracting disclosures, and conflict-of-interest requirements.

10 Proponent Checklist

- Company information (legal name, address, contacts, overview)
- Technical proposal (approach, work plan, schedule, team bios/CVs)
- Financials (itemized costs; milestone-based payment plan, leveraged funding)
- Disclosures (subcontracting intent; conflicts of interest)
- Insurance confirmation (CGL $5M; Professional Liability $2M)
- Submission format (single PDF + required forms); deadline; 90-day validity

11 Legal Conditions

11.1 Non-Binding Solicitation; No Obligation to Award

This Request for Proposals (RFP) is not an offer to contract. No contractual, quasi-contractual, fiduciary, or other legal obligations of any kind are created by this RFP or by any submission, communication, or conduct of PTAC unless and until a written Funding Agreement is executed by duly authorized representatives of PTAC and the successful Proponent. PTAC may cancel, amend, or suspend this RFP at any time without liability.

11.2 PTAC's Reserved Rights

Without limiting any other rights, PTAC may, in its sole discretion and without liability: (a) accept or reject any or all Proposals; (b) accept a Proposal in whole or in part; (c) waive non-material irregularities; (d) seek clarifications; (e) negotiate changes to scope, schedule, and pricing with one or more Proponents; and (f) cancel this RFP at any time. The lowest-priced Proposal will not necessarily be selected.

11.3 No Claim for Compensation; Bid Costs

Each Proponent is solely responsible for all costs associated with preparing and submitting its Proposal, as well as any related activities. PTAC shall not be liable for any such costs or damages, whether or not the Proponent is selected for award.

11.4 Limitation of Liability

To the maximum extent permitted by law, PTAC shall not be liable to any Proponent for indirect, incidental, consequential, special, punitive, or exemplary damages, loss of profit, loss of opportunity, or loss of reputation arising out of or related to this RFP, the evaluation process, or any decision to award or not award funding, even if advised of the possibility of such damages. Any direct liability of PTAC to a Proponent is strictly limited to the reasonable, proven out-of-pocket costs of preparing the Proposal, which the parties agree is disclaimed by Section 4.

11.5 Verification and Clarifications

PTAC may request clarifications, additional information, or presentations from any Proponent and may verify any information contained in a Proposal through interviews, reference checks, third-party sources, or site visits. Failure to respond promptly may result in disqualification.

11.6 Grounds for Disqualification

PTAC may, at any time, disqualify a Proposal or rescind a selection if: (a) the Proposal is late, incomplete, or non-compliant; (b) the Proponent fails to disclose or address an actual or potential conflict of interest; (c) the Proposal contains misrepresentations or misleading information; (d) the Proponent engages in collusion, unfair competition, improper influence, lobbying outside the authorized contact, or attempts to obtain confidential information not publicly available; or (e) adverse information materially affecting the Proponent's qualifications comes to PTAC's attention.

11.7 Proponent Representations & Warranties

By submitting a Proposal, the Proponent represents and warrants that: (a) the Proposal is accurate, complete, and not misleading; (b) all proposed work product will not infringe intellectual property or other rights of third parties; (c) the Proponent and proposed subcontractors are duly qualified and in good standing; and (d) it will maintain the insurance required by the RFP and Funding Agreement.

11.8 Confidentiality; Use and Disclosure

Information provided by PTAC in connection with this RFP is confidential and may be used solely for Proposal preparation and evaluation. Proponents must not disclose such information to any third party except their team members, advisors, or subcontractors who have a need to know and are bound by confidentiality obligations no less protective. PTAC may disclose Proposals to its funders, technical committees, advisors, and partners for evaluation and administration and may make disclosures as required by law or court/government order.

11.9 Intellectual Property & License to Use

Subject to the Funding Agreement, IP arising from the Project may be owned by AUPRF funders, or funders will receive a perpetual, royalty-free right to use the IP in their operations without additional compensation. Proponents must ensure they have all the rights necessary to grant such ownership or licenses. If IP is generated by the proposal/project, no other IP ownership or sharing options are acceptable. If IP is not generated by this project, this provision is unnecessary.

11.10 Subcontracting

The Proponent must disclose its intent to subcontract any portion of the work. PTAC reserves the right to approve or reject proposed subcontractors. The Proponent remains fully responsible for all subcontracted work.

11.11 Proposal Validity

Proposals must remain irrevocable and open for acceptance for 90 days after the submission deadline.

11.12 Acceptance Not a Waiver

PTAC's acceptance of a Proposal, or its failure to identify deficiencies, does not waive any requirement of the RFP or Funding Agreement and does not relieve the Proponent from responsibility for compliance or performance.

11.13 Order of Precedence; Entire Agreement

In case of conflict, the following order of precedence applies: (1) the executed Funding Agreement (including schedules), (2) the specific RFP (including addenda), (3) these Proponent Instructions, and (4) the Proposal. The executed Funding Agreement constitutes the entire agreement for project performance.

11.14 Governing Law and Forum

This RFP and any related dispute are governed by the laws of the Province of Alberta and the federal laws of Canada applicable therein, without regard to conflict-of-laws rules. The parties attorn to the exclusive jurisdiction of the courts of Alberta, sitting in Calgary.

11.15 Insurance & Indemnities

At a minimum, the Proponent shall maintain CGL of $5,000,000 and Professional Liability of $2,000,000, as well as any other insurance required by the Funding Agreement. Proponents will indemnify and hold harmless PTAC, its officers, directors, employees, and agents from third-party claims arising out of the Proponent's acts or omissions in connection with the Proposal or the Project, subject to the Funding Agreement.

11.16 Addenda and Questions

Only written addenda issued by PTAC form part of the RFP. Proponents are responsible for monitoring the RFP communication channel (the PTAC website) and ensuring their Proposal reflects all addenda.