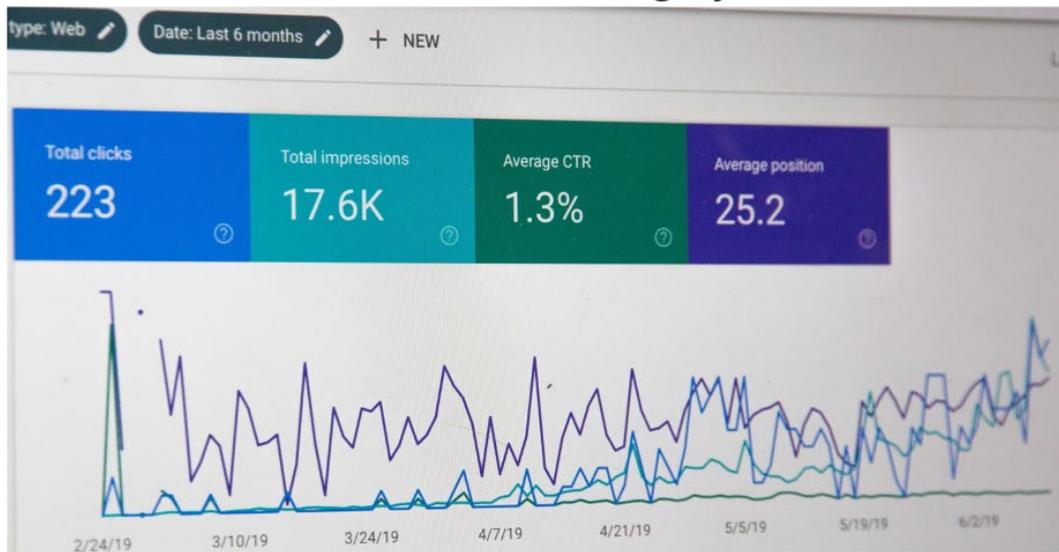


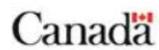


Atlantic Canada Certified Sites Program New Certification Category



Request for Proposals

August 2022



***Ref 30-08-22**

**REQUEST FOR PROPOSAL-
Notice to Prospective Consultants**

August 30th, 2022

You are invited to review and respond to this Request for Proposal (RFP), providing services related to the development of a ***new certification category/categories for the Atlantic Canada Site Certification Program***. In submitting your proposal, you must comply with these instructions.

Please note that no verbal information given will be binding unless such information is issued in writing as an official addendum.

In the opinion of the Atlantic Association of Community Business Development Corporations, this RFP is complete and without the need for explanation. However, if you have questions, or should you need any clarifying information, the contact person for this RFP is:

Joe Brennan
(Atlantic Association of Community Business Development Corporations)
902-747-2232 (Office)
902-631-2397 (Cell)
joe.brennan@cbdc.ca

Please note we require all responses to this RFP to be based on fixed-priced quotes, no estimated quotes will be considered.



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1.0 Introduction

The Atlantic Association of Community Business Development Corporations (AACBDCs), invites interested firm(s) (Consultant) to respond to this Request for Proposals (RFP) to provide services related to the development of a new certification category/categories for the Atlantic Canada Site Certification Program.

2.0 Contracting Agency

For this contract, the AACBDC will be the contracting agency.

The AACBDC is engaged in community-based business development through a network of autonomous, not-for-profit organizations that work with all levels of government and the private sector to meet the needs of small and medium enterprises.

In Atlantic Canada, there are 41 corporations dedicated to assisting small and medium enterprises including start-up, expansion, modernization, and maintenance of business entities in all sectors of the economy.

The AACBDC administers, on behalf of its 41 member CBDCs, several programs and initiatives. AACBDC is governed by a volunteer Board of Directors that is selected by each of the Atlantic provinces to provide oversight and governance of the affairs of the organization.

3.0 Background

3.1 Atlantic Growth Strategy

The Government of Canada and the four Atlantic provinces recognize that trade and investment are key economic drivers in the Atlantic region.

Through an all-inclusive, pan-Atlantic, whole-of-government approach - the Atlantic Growth Strategy (AGS) (<http://www.acoa-apeca.gc.ca/ags-sca/Eng/atlantic-growth.html>) undertakes cooperative actions aimed at stimulating economic growth in the region.

3.2 Atlantic Trade and Investment Growth Strategy (ATIGS)

One pillar of the AGS is the Atlantic Trade and Investment Growth Strategy (ATIGS) which was first launched in 2017. Now five years later, the ATIGS has been renewed. The new strategy builds on successes and lessons learned and aims to strengthen the implementation of firm-focused, growth-oriented trade and investment activities in a coordinated manner.

Under the new ATIGS, the core federal and provincial partners will work with partners to achieve the following three main objectives:

- Increase the number of Atlantic firms engaging in international business activity.
- Increase the capacity of Atlantic firms to strategically enter new, sustain or increase their activity, in international markets.

- Strengthen the region's capacity to attract FDI.

In support of the updated ATIGS, the federal and provincial partners have renewed their commitment to trade and investment in Atlantic Canada by signing a joint Atlantic Trade and Investment Growth Agreement (ATIGA). Under the ATIGA the partners will invest close to \$20 million over five years to implement firm-focused, strategic market development plans to expand Atlantic Canada's international business activities.

The ATIGS Management Committee (MC) has created an FDI Team that has been given the mandate to collaborate on projects which will focus on increasing FDI in Atlantic Canada. FDI is defined as investment transactions with individuals/entities outside of Canada.

The FDI Team aims to strategically market the region by displaying the best it has to offer to:

- Attract new global investments.
- Ensure regional investment stakeholders have the information and training required to respond to incoming foreign interests.
- Encourage the coordination and leveraging of federal and provincial resources to close more foreign investment deals in Atlantic Canada.

3.3 FDI Project Background

Based on the need identified through ATIGS for FDI initiatives, the Atlantic Chamber of Commerce (ACC), in the fall of 2017, undertook a feasibility study to determine the need for an Atlantic Canada Site Certification Program. With the receipt of positive feedback from the feasibility study, a second project to design the Atlantic Site Certification Program was initiated by the ACC in the spring of 2019. This design work generated outputs that included the minimum criteria for a "development ready" site within Atlantic Canada, key program materials and a structured approach to operationalizing and evaluating the Atlantic Site Certification Program.

As part of the work undertaken in 2019, the following Site Certification deliverables were developed:

- Key Program Materials
 - Application form
 - Application checklist
 - Property information sheet
 - Request for proposals for web development, promotional strategy, and 3rd party certification
- Program Guide
 - A proposed governance model with key roles and responsibilities identified
 - Detailed site certification process including information on site categories and minimum eligibility criteria
 - Proposed program budget for operations and proposed funding model
 - Proposed program evaluation criteria

Following up on the work listed above, the AACBDC submitted a proposal in December 2019 to manage the implementation of program deliverables and operationalize the Atlantic Canada Certified Sites Program. The program design started to take shape early in 2020 with the retention of a marketing and communications consultant to develop a program website, online application portal and a comprehensive marketing program.

A consultant was also retained to conduct site certification services. As landowners applied for their site certification designation, the consultant would adjudicate and verify that the site application and minimum program requirements were met before official certification was granted.

Throughout 2020, the AACBDC worked in conjunction with the FDI Team and program consultants to operationalize the program. In September 2020, the landowner phase was launched, promoting the program to landowners, as property owners were sought within Atlantic Canada to apply for certification.

During the remainder of 2020 and 2021, the AACBDC and FDI Team worked to promote the merits of the program to landowners throughout the Atlantic region. In September 2021, the investor phase of the program was launched with the promotion of the certified sites to investors and site selectors around the globe.

Currently, 43 landowners have submitted sites for certification, nine properties have been granted certification, with more landowners working towards certification and additional certified sites coming on stream very soon.

Despite the complications and challenges associated with the COVID-19 Pandemic, the program has made great strides over the past 27 months. The Atlantic Canada Certified Sites Program has and is continuing to provide a valuable resource to landowners throughout Atlantic Canada, site selectors and investors from around the world, looking at Atlantic Canada as a place to invest.

This proposal outlines the program details up to March 31st, 2023.

3.4 Engagement Overview

The AACBDC has identified the need for a Consultant(s) with technical knowledge and expertise to research and then develop a new certification category/categories for the Atlantic Canada Site Certification Program. The work specific to this deliverable will include research, design and development and process flow and implementation.

The current program has established minimum criteria that sites must meet to be eligible for certification. The number and nature of the eligibility criteria directly affect the number and types of sites that will be processed, assessed, and certified. With that said, a need has been identified for the addition of another certification category or categories to the program. It is expected that this addition will encourage more landowners to apply for certification and

encourage those already in the certification funnel to complete their certification that was paused due to not meeting the current minimum certification criteria.

3.5 Engagement Oversight

The AACBDC has appointed Joe Brennan as Program Manager to liaise with the Consultant for ongoing information and project management requirements. For the length of this engagement, the Consultant will report to the Program Manager.

Additional oversight may be provided by the FDI Team, which is comprised of:

- Two representatives from the Atlantic Canada Opportunities Agency (ACOA).
- One representative from Invest in Canada (IIC).
- One representative from each of the four Atlantic provinces. (provincial (EDOs)
- One representative from the AACBDC.

4.0 Project Scope

For this engagement, the project scope will include three activities: (4.1) Research, (4.2) Design and Development, and (4.3) Process Flow and Implementation.

4.1 Research

The first requirement of the project is for the consultant to conduct a review of the current certification categories and minimum requirements and then perform an “Options Analysis” of any potential change(s) to the minimum requirements/addition category/categories and their impacts. This phase will be completed before the activities outlined in 4.2 and 4.3 and is expected to include, at a minimum:

- Attend a project kick-off discovery meeting with the Program Manager and FDI Team prior to the project start
- The consultant will conduct a review of the current certification categories and minimum requirements.
- After the initial review, the consultants will be required to perform an “Options Analysis” of any potential change(s) to the minimum requirements/additional category/categories and their impacts. As part of this process, the consultant will interview each EDO, ACOA, IIC and Turner Drake and Partners to gain insight into any possible changes.
- The Consultant will summarize the options and any possible recommended changes to the minimum requirements/addition category/categories moving forward weighing the pros, cons and potential impacts on the landowners, investors, and the program.
- The findings will be presented to the FDI Team for their review, consideration, and approval.

All of the deliverables listed in 4.1 must be reviewed and signed off by the AACBDC before the items listed in 4.2 and 4.3 are started.

4.2 Design and Development

The second requirement of the project is the design and development of new certification category/categories and the development of an implementation strategy. This is expected to address the following areas:

- After the research component of the project is completed, the consultant will then begin the development and design of the new certification category/categories.
- Review the current program minimum requirements and consider any impacts or potential changes needed to be made.
- Meet with the FDI marketing consultant who is engaged by the AACBDCC to discuss how certified sites and the investor portion of the current <https://atlanticcanadacertifiedsites.com/> website can be incorporated into the Atlantic4.ca website

Following completion of the above tasks, developing an implementation strategy for approval by the Program Manager and FDI Team that outlines tasks, budgets, timelines, and responsibilities.

4.3 Process Flow and Implementation

The third requirement of the project is the operationalization of the process flows for the new certification category (s) and the implementation strategy. This is expected to address the following areas:

- Following the approval of the implementation strategy begin operationalization of the new minimum requirements and certification categories.
- Ensure that the changes are reflected in all program material including:
 - Program Website
 - Application
 - Marketing Material
 - Minimum Requirements
- All materials will be required to be done in both official languages
- As with any change, the implementation will need to be closely monitored by the Consultant and Program Manager to ensure a smooth transition.

5.0 Deliverables and Milestones

The following chart provides a breakdown of the key project milestones throughout the engagement.

<u>Project Kick-Off and Discovery</u>	September 2022
Engagement of Consultant	September 2022

<u>Research</u>	September - October 2022
Perform an Options Analysis of potential changes	September - October 2022

<u>Design and Development</u>	September - October 2022
Design and Development of new certification category/categories	September - October 2022

<u>Process Flow and Implementation</u>	October - January 2023
Project Understanding and Goal Development/Setting	October 2022
Design, Process, and Implementation	November - January 2023

6.0 Proposal Structure

Table 1: Response Structure	
Introduction	This section should briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
Understanding the issue	This section should explain the Consultant's understanding and interpretation of the objectives and requirements of this project. The successful Consultant(s) will have demonstrated a good understanding of the work to be undertaken.
Work plan and methodology	This section should include the Consultants work plan, methodology and understanding of the objectives and tasks outlined in section 4.0 above.
Summary of qualifications and experience	This section must include: <ul style="list-style-type: none"> A brief résumé of the qualifications and experience of the consulting firm as they relate to this RFP. It should clearly outline corporate knowledge of the sector and regional knowledge.

	<ul style="list-style-type: none"> • A list of key project personnel to be used in the project outlining their roles and responsibilities. • (If applicable) a list of any subcontractors (individual or organization) that the Consultant intends to use when providing services under this RFP; • Corporate profiles and short-form résumés of key project personnel, as well as references for related work to be included as an appendix. Provide two reference projects where the company has undertaken work of similar scope and scale.
Pricing	<p>Pricing is to be detailed in a table and should include:</p> <ul style="list-style-type: none"> • All professional fees • Travel costs (if applicable) for face-to-face meetings • Other costs

7.0 Project Schedule

The project schedule should assume an approximate starting date of September 30th, 2022. The term of the contract is anticipated to be up to and including March 31st, 2023.

8.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 pm on September 23rd, 2022.

- Proposals should not exceed twenty (20) pages, excluding appendices. Appendices are acceptable as outlined prior.
- A digital copy is required.
- The successful proponent will be contacted within 14 business days of the RFP closing.
- Please submit an electronic version of the proposal in Word and Adobe Portable Document Format (PDF) to the following email address: joe.brennan@cbdc.ca.

9.0 Proposal Evaluation

The AACBDCs will evaluate the proposals. The lowest-priced proposal may not necessarily be accepted. The AACBDC reserves the right to recommend rejection of all proposals and either cancel or re-issue the RFP if necessary.

The qualifications, commitment, related experience, and knowledge of the project personnel will be key evaluation factors. The experience of the consulting team in undertaking assignments of this nature and magnitude will be a significant factor in proposal selection. The evaluation framework outlined in Table 2 will be used in the selection with special attention given to the methodology, the project management, and the delivery plan.

The Evaluation criteria used to evaluate proposals fall into the following categories as referenced in Section 6:

Table 2: Selection Criteria		
	Factor	Scoring
1.	Consultant (s) experience demonstrates the ability to provide requested services	15
2.	Consultant (s) demonstrates an understanding of the project, its objectives, and metrics for evaluation	25
3.	Completeness and suitability of approach (proposed methodology)	20
4.	Capacity (identification of resources to undertake the project as well as relevant skills and experience by the individual)	15
5.	Pricing	25
	Total	100

Please note: we may choose to interview a shortlist of consultants as part of the evaluation process.

10.0 Awarding of Contract

The resulting contract will contain such reasonable terms as the AACBDC may require.

The award of the contract will be made by the AACBDC, based upon the results of the evaluation of submitted proposals. The AACBDC will notify the successful Consultant in writing via electronic means. Those that are not successful will receive a written notification via electronic correspondence as soon as possible once the award of the contract has been accepted and the negotiations have been concluded with the successful Consultant.

11.0 Contact

All inquiries and requests for clarification must be submitted via email. Requests for clarification should be directed to joe.brennan@cbdc.ca.

The AACBDC will administer the contract for this project. Contact for this RFP is:

Name: Joe Brennan

Organization: Atlantic Association of CBDCs

Address: 459 Murray Street, Mulgrave, NS B0E 2G0

Email: joe.brennan@cbdc.ca
Telephone: (902) 747-2232 Ext 202 or (902) 631-2397 Cell

12.0 General Conditions

Verbal information or representations shall not be binding on the AACBDC. Only changes, alterations, modifications, or clarifications approved in writing will be binding. To be valid all such changes, alterations, modifications, or clarifications shall be issued in the form of addenda and all such addenda shall become a part of this RFP.

The proposal of the successful Consultant will form part of any resultant contract agreement by attachment and incorporation by reference. Claims made in the proposal will constitute contractual commitments. Any provision in the proposal may be included in the resultant contract as a direct provision thereof. The successful Consultant, as a condition of submitting its proposal, accepts a customized contract that will be negotiated.

Any resultant contract from this RFP will be governed by the by-laws of the AACBDC and shall be issued in the name of the successful Consultant exactly as that successful Consultant's personal or corporate name is stated in the RFP response document. Funds payable for materials delivered under any resultant contract shall be paid only to the Consultant who is so listed as a party to any resultant contract. Only legal registered names of Proponents are acceptable.

The proposal will contain the signature, name and title of the person authorized to sign on behalf of the Consultant on the proposal submitted in response to this RFP.

The responsibility rests with the Consultant to submit a complete proposal, with proper and adequate detail to substantiate all aspects of its proposal. Incomplete proposals shall be deemed to be non-compliant. A complete proposal should include but not be limited to:

- Legal name and status: The proposal shall state the correct legal name and legal status of the proposing entity and the correct mailing address.
- Consultant contact: The name, title, telephone and fax numbers, e-mail address and civic address of a representative who may be contacted for clarification or other matters relating to the proposal shall be provided.
- Content: The proposal will be clear, and concise, and must include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal shall not simply rephrase or restate the requirements, but rather shall provide a convincing rationale to demonstrate how the Consultant intends to meet these requirements.

The successful Consultant must be licensed to conduct business in its jurisdiction and may be required to produce a certificate of good standing for that jurisdiction.

All terms and conditions will apply to all subcontractors and the Consultant will be responsible for subcontractors' compliance. The Consultant will be responsible for all work done by the

subcontractors. The Consultant will be responsible for all damages and will complete any work unfinished by the subcontractors.

The following constitutes the release of payment by the AACBDC for this engagement:

1. 10% released upon signing of the contract.
2. 40% released upon presentation and signoff of options analysis.
3. 50% released upon successful development and implementation of the new certification category/categories.

13.0 Intellectual Property and Disclosure

All proposals and any intellectual property that is developed as a result of this project, including all data, specifications, concept plans, designs, rationales, presentation materials, economic and technical reports and related information produced by the Consultant in completing this work submitted shall become the property of the AACBDC. By submitting a proposal, the Consultant hereby grants the AACBDC a license to distribute, copy, print or translate the proposal for the invitation and completion of the project, including to the members and representatives of ATIGS.

All documents submitted by partner agencies shall remain the property of the issuing organization. All information is proprietary and as such shall be treated as confidential. Information obtained by the Consultant as a result of participation in this project is confidential and must not be disclosed without written authorization.

14.0 Appendix



Atlantic Canada Site Certification Program Minimum Eligibility Requirements

Criteria	Office	Industrial	
	Development Land	Vacant Buildings	Development Land
Established Price and Terms of Sale/Lease	Price and Terms of Sale must be provided		
Access to Electric Power	Three-Phase Power		
Access to Water/Wastewater	Must have municipal water & wastewater	Access to water/ wastewater processing	
Minimum Telecommunications Quality	Letter from telecommunications provider indicating the type of telecommunications service available or the cost & time required to provide service to the site.		
Minimum Size	Independent Site <ul style="list-style-type: none"> 5 contiguous acres (single site) Multiple Sites in Industrial Park <ul style="list-style-type: none"> Total of 5 acres across all sites being certified 	20,000 sq. ft.	Independent Site <ul style="list-style-type: none"> 10 contiguous acres (single site) Multiple Sites in Industrial Park <ul style="list-style-type: none"> Total of 10 acres across all sites being certified
Zoning	Letter from municipality confirming the property is zoned for commercial use	Letter from municipality confirming the property is zoned for industrial use	
Environmental Site Assessment (ESA)	Environmental Site Assessment (ESA) Phase 1 complete. If the results of a Phase 1 ESA require a Phase 2 ESA that will need to be completed before certification is granted. The certification would be based on either a clean phase 2 review or, if issues are revealed, a plan for remediation including anticipated costs.		
Transportation	The site must have existing frontage and access from a public right-of-way		
Sponsorship/endorsement of by economic development authority	The application must be endorsed by a planning official of the applicable provincial, municipal or regional economic development organization, or delegate.	The application must be endorsed by the applicable provincial, municipal or regional economic development organization.	