



# Atlantic Canada FDI Trade Mission to the Western United States

## Request for proposal

May 2023 | Ref 05-23-23 -CA



**\*Ref 05-23-23 -CA**

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

May 26<sup>th</sup>, 2023

You are invited to review and respond to this Request for Proposal (RFP), providing consulting services related to hosting an ***Atlantic Canada In-Market FDI Mission – Orange County, California***. 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](mailto: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(s) to respond to this Request for Proposal (RFP) to provide consulting services related to hosting an Atlantic Canada In-Market FDI Mission to the United States West Coast.

## **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 Provinces of New Brunswick, Newfoundland and Labrador, Nova Scotia, and Prince Edward Island (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 and has been renewed in 2022. 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 Project Background**

The four Atlantic Canadian provinces and ACOA, through ATIGS, will host an in-market FDI mission to the US West Coast. The project aligns with the ATIGS objective of increasing the region's capacity to attract FDI to Atlantic Canada. The purpose is to host FDI events in Orange County, Seattle, and Portland. The format will consist of a presentation, a business lunch, and then one-on-one meetings between businesses and ATIGS partners. The mission is planned for the week of October 23<sup>rd</sup>, 2023.

In-market, Consultants will be procured to refer leads for each of the four in-market events. The locations are Orange County (two days), Portland, and Seattle. Atlantic participants will include representatives from Innovation PEI; Invest Nova Scotia; Opportunities New Brunswick; NL Industry, Energy, and Technology; ACOA; and the Atlantic Association of CBDCs. Global Affairs Canada will assist in coordinating the in-market activities through their Ottawa headquarters as well as their Trade Commissioner Service offices in Los Angeles and Seattle. Planned activities in each of the four locations include a plated lunch followed by B2B meetings. Targeted business attendees will primarily be C-level executives or owners from companies with over \$10M in revenues with plans to expand operations in North America in the next 5 years.

### **3.4 Engagement Overview**

This initiative is designed to identify, qualify, and advance foreign direct investment leads within the ocean tech, clean tech, and life sciences sectors for the Atlantic region. Other sectors will be considered including software development, technical service, aerospace commercial MRO,



video game development, clean technology, energy storage, advanced manufacturing, and food processing.

Atlantic Canada is often overlooked by international investors for a variety of reasons including lack of awareness of its value proposition, aggressive competition, fewer FDI resources relative to larger competing jurisdictions, and the incorrect assumption that the region does not have a well-diversified economy suitable for success. This mission seeks to overcome these deterrents and build greater awareness of the region's value proposition in markets that fit the sectors of focus.

The target locations were selected based on current research such as that indicating companies are leaving California. On average, 6.3 companies move their headquarters out of the state every month. Similar trends are potentially manifesting in Portland and Seattle. As companies re-examine their presence in these regions, Atlantic Canada can position itself as an attractive location for projects and activities no longer feasible on the US West Coast.

Atlantic Canada also benefits from an attractive value proposition for companies in these regions. Its geographic proximity to major US markets, the availability of talent, financial incentives at the provincial level, and the country's immigration programs are all major selling features.

**Please note:** *Companies and sectors not being targeted for this project include but are not limited to financially distressed companies, companies seeking a sales location, gambling, online casinos, pornography, and firearms manufacturers.*

### **3.5 Engagement Oversight**

The AACBDC has appointed Joe Brennan as Program Manager to liaise with the Consultant(s) 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 project team, which is comprised of:

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

## **4.0 Description of Initiative**

### **4.1 Attendees**

In-market, Consultants will be engaged to identify C-suite level executives from companies with revenues of \$10 million with plans to expand within 18 months - 5 years. (Tier 1: prospects within 18 months; Tier 2: prospects within 18 months to 3 years; Tier 3: prospects within 3 to 5 years).

To find these attendees, the project team will hire a consultant ( in-market lead generator). A Consultant will be needed to support a two-day event in Orange County, California. The sectors of focus are as follows:

- Day 1: Clean Tech and Ocean Tech
- Day 2: Life Sciences

#### **4.2 Event Format**

The format of each event will involve a plated lunch followed by B2B meetings. During the meal, business leaders will speak about their experience regarding Atlantic Canada’s value proposition and then a “Question and Answer” session will follow. At the end of the hour, attendees will be divided into one-on-one meetings (30-minute meetings) with ATIGS representatives in individual rooms, with the hope that each province will meet between five and eight companies in each city with an expansion opportunity identified at each one.

The event in each location will hold approximately 70 attendees. The project team should limit government attendees to a maximum of three per partner. The breakdown should therefore be 55 company attendees and 15 government attendees.

#### **Draft Agenda for each Event:**

- 12:00 pm Lunch (Presentation topic TBD)
- 12:45 pm Questions and Answer Session
- 1:00 pm Business 2 Business (B2B) Meetings Commence (30 min sessions)
- 5:00 pm End of B2B meetings

At the end of the presentation, attendees will be divided into pre-arranged one-on-one meetings (30-minute meetings) with ATIGS representatives in individual rooms, with the hope that each province will meet between five and eight companies in each city with an expansion opportunity identified at each one. The one-on-one meetings will consist of the company representatives providing information on their future growth plans and ATIGS representatives will provide potential opportunities to support the plans. The meeting objective is for company representatives to obtain information about Atlantic Canada and how the region can provide value to their company. The meeting format is a casual discussion, and any shared information will be kept confidential.

#### **4.3 Food and Venues**

The project team has been advised to hold the events in unconventional venues, as those tend to be stronger draws than hotel conference rooms or corporate offices. Examples include art galleries, law firm offices, and golf clubs. Both a large room for the meal and smaller, individual rooms for the B2B meetings will be required.

A podium, audio equipment, and a screen/projector will also be secured at each venue to allow for a presentation during the meal.

Food will be secured through the venue if possible. Otherwise, the project team will secure catering as well.

## 5.0 Deliverables and Milestones

The mission is planned for the week of October 23<sup>rd</sup> and will encompass four days with two days earmarked for California (October 23<sup>rd</sup> and 24<sup>th</sup>) and one day dedicated to Portland (October 25<sup>th</sup>) and Seattle (October 26<sup>th</sup>).

Below is a full breakdown of activities the project team will conduct in the lead-up to the mission.

<b>Project Milestone</b>	<b>Timeline</b>	<b>Outcome</b>
Engagement of Consultant	June 2023	The Consultant has been identified, and project onboarding has commenced.
Venue Identification	July 2023	Consultant to provide suggestions and assist the project team in securing venues, food/catering, and AV services for the event.
Lead Generation	July - September 2023	The Consultant will be responsible for lead generation for the event. <i>(Provide a prospective list of leads for review and approval by the project team before contacting or sending the invitation)</i>
Leads Invited to the Event	August - October 2023	Consultant will: <ol style="list-style-type: none"> <li>1. Invite leads to the event.</li> <li>2. Provide leads with information on the Atlantic region.</li> <li>3. Establish B2B meetings with leads.</li> </ol>
Supply Intermediary Profiles of Leads to the Project team	October 2023	The Consultant will <i>(two weeks in advance of the event)</i> : <ol style="list-style-type: none"> <li>1. Provide the project team with the name and description of the lead. Including sector(s) of focus, description of the engagement opportunity,</li> </ol>



		and how the EDO can add value.
Event Execution	Week of October 23 <sup>rd</sup> , 2023	The Consultant will be required to be in attendance on the day of the event to work with the project team and the Trade Commissioners to ensure an optimal outcome is achieved.
Final Project Report	Mid-November 2023	The Consultant will provide a report on the mission's outcomes.

## 6.0 Proposal Structure

Table 1: Response Structure	
<b>Introduction</b>	This section should briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
<b>Understanding the issue</b>	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.
<b>Work plan and methodology</b>	This section should include the consultant's work plan, methodology, and understanding of the objectives and tasks outlined in section 4.0 above.
<b>Summary of qualifications and experience</b>	<p>This section must include:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• A list of key project personnel to be used in the project outlining their roles and responsibilities.</li> <li>• (If applicable) a list of any subcontractors (individual or organization) that the Consultant intends to use when providing services under this RFP.</li> <li>• 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.</li> </ul>
<b>Pricing</b>	<p><b>Pricing is to be detailed in a table and should include:</b></p> <ul style="list-style-type: none"> <li>• All professional fees</li> </ul>

	<ul style="list-style-type: none"> <li>• Travel costs (if applicable) for face-to-face meetings</li> <li>• Other costs</li> </ul>
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## 7.0 Project Schedule

The project schedule should assume an approximate starting date of June 19<sup>th</sup>, 2023. The term of the contract is anticipated to be up to and including November 17<sup>th</sup>, 2023.

## 8.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 pm on June 9<sup>th</sup>, 2023.

- 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](mailto: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 criteria used to evaluate proposals fall into the following categories as referenced in Section 6:

	<b>Factor</b>	<b>Scoring</b>
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
	<b>Total</b>	<b>100</b>

*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](mailto: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 legally 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. 50% released upon completion of the venue identification and leads invited to the event.
3. 40% released upon successful event execution and presentation of the final report.

### **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.