

Atlantic Canada Advantage

Atlantic Canada Roadshow RFP

August 2024



***Ref 08-06-24:ACR**

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

August 6th, 2024

You are invited to review and respond to this Request for Proposal (RFP), entitled **Atlantic Canada Roadshow - Atlantic Canada Advantage**. 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
902-500-4336 (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 (AACBDC) invites interested consultants to respond to this Request for Proposal (RFP) for the development, coordination, and presentation of material at a series of events across rural Atlantic Canada, known as the Atlantic Canada Roadshow. The Atlantic Canada Roadshow aims to engage and educate communities across Atlantic Canada, focusing on those outside metro areas, about investment attraction and readiness.

Financial support for this project is provided in part through the Atlantic Trade and Investment Growth Agreement, between the Government of Canada and the governments of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador.

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 is a key economic driver 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. ATIGS was 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 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 international markets or sustain

or increase their international trade.

- Strengthen the region's capacity to attract foreign direct investment (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 cohorts will invest close to \$20 million over six 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 Engagement Overview

The AACBDC, in collaboration with the Government of Canada and the governments of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador has identified the need for a consultant to develop the need for a consultant to develop, coordinate and present material at the Atlantic Canada Roadshow to ensure uniformity.

The Atlantic Canada Roadshow aims to engage and educate communities across Atlantic Canada, particularly those outside metro areas, about investment attraction and readiness. Through a series of events, the Roadshow will offer valuable insights into Foreign Direct Investment (FDI) and highlight current investment readiness activities led by the FDI team. The goal is to equip communities with the knowledge and tools to effectively present their value propositions to potential investors, thereby enhancing their ability to attract and retain investments. One key focus will be the Atlantic Canada Certified Sites Program, an essential tool developed by the FDI team to help communities achieve investment readiness.

The sessions will cover an introduction to Foreign Direct Investment (FDI) and help communities effectively present their value propositions. The goal is to ensure that communities understand the importance of investment readiness to maximize opportunities across Atlantic Canada.

Please note that the sessions will be available both in person and virtually.

3.4 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 Economic Development Organization (EDO))
- One representative from the AACBDC

4.0 Project Scope

The project scope will include the following three objectives.

4.1 Project Kick-Off

The first requirement of the project is a project kickoff meeting that focuses on reviewing the Atlantic Canada Advantage Value Propositions, the strategic work plan and understanding project goals, deliverables, and timelines. It is expected that this meeting will include the consultant, the Project Manager, and the FDI team.

After this meeting, the consultant will undertake a review of the relevant FDI program and background material that has been developed to date.

4.2 Content, Promotional Material & Presentation Development

The consultant will be responsible for developing content for both sessions of the Roadshow. The first session will introduce FDI, while the second will focus on helping communities create and present their value propositions.

Once the content is defined and compiled, the consultant will create a PowerPoint presentation to be used at each session of the Atlantic Canada Roadshow.

Additionally, the consultant will develop promotional materials to promote and encourage participation at the events throughout the region.

The content must be created in both English and French.

Please note that the program content should be adaptable based on the audience, as FDI readiness awareness varies greatly across provinces.

4.3 Roadshow Delivery

Once the content is defined and the presentation is developed and approved by the FDI team, the consultant will be responsible for delivering the presentation at each event across the region. A representative from the FDI team will also attend their respective provincial events to assist with Q&A at the end of each session.

The Atlantic Canada Roadshow will feature both in-person and virtual events at predetermined locations (outside of metro areas) across the Atlantic region. The events will be divided into two sessions and will include the following:

- 1. Session One: Introduction to FDI:**
 - o Definition and importance of FDI.

- o Priority focus areas of Atlantic Canada.
- o Showcase current investment readiness activities led by the FDI team (Atlantic Canada Certified Sites Program).
- o Successful FDI projects in Atlantic Canada.
- o Q&A and networking.

2. Session Two: Creating and Presenting Value Propositions:

- o Identifying unique selling points of communities.
- o Crafting compelling value propositions for investors.
- o Practical tips on presenting information to potential investors.
- o Q&A and networking.

The sessions will be offered to engage and educate communities across Atlantic Canada on the importance of investment attraction and readiness. It will also showcase current investment readiness activities led by the FDI team such as the Atlantic Canada Certified Sites Program.

Each session will last up to 90 minutes, with approximately one hour dedicated to the presentation and the remaining time for Q&A and networking.

The content shall be available in English and in French.

5.0 Deliverables and Milestones

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

5.1 Project Kick-Off and Discovery	September 2024
Engagement of Consultant	September 2024
5.2 Content & Presentation Development	September - October 2024
Content Development	September - October 2024
Promotional Material Development	October 2024
Presentation Development	October 2024
5.3 Roadshow Delivery	October - December 2024
Venue Identification	October 2024
Roadshow Event Delivery	November - December 2024
5.4 Final Report	March 2025
Completion of the Project Final Report and Presentation	March 2025

6.0 Proposal Structure

Introduction	This section should introduce and briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
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<p>Understanding of the Issue</p>	<p>This section should explain the consultant’s understanding and interpretation of the objectives and requirements of this project. The successful consultant will have demonstrated a good understanding of the work to be undertaken.</p>
<p>Work Plan and Methodology</p>	<p>The section should include:</p> <ul style="list-style-type: none"> • A description of the consultant’s process and approach to the project objectives: <ul style="list-style-type: none"> • Development of content. • Construction of slideshow presentation. • Delivery of presentation. • A project schedule including deliverables and milestones (the consultant will be required to make regular oral and written reports to the AACBDC & the FDI team on the progress of the work). • Summary of any necessary travel required to complete the project (if applicable). Video/teleconference meetings with the AACBDC & the FDI team will be held as required.
<p>Summary of Qualifications and Experience</p>	<p>This section should include:</p> <ul style="list-style-type: none"> • A brief résumé of the qualifications and experience of the consultant as they relate to this RFP. A description of experience working on economic development-related projects in Atlantic Canada. • Years in business, number of employees, civic address, ability to develop materials in both official languages. • A list of key project personnel to be used in the project outlining their roles, responsibilities, and their relevant experience. • A list of any subcontractors (individual or organizational) 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.
<p>Pricing</p>	<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. <p>This section must provide the total cost for the engagement and be</p>

	<p>divided into the following categories:</p> <ul style="list-style-type: none"> • Development of content and presentation. • Roadshow delivery. • Delivery of presentation / Final report. <p>Travel costs will only be reimbursed for actual travel incurred and will follow federal guidelines (https://www.njc-cnm.gc.ca/s3/en). Travel costs are to be considered and included in the price outlined.</p> <p>Prices quoted shall include Harmonized Sales Tax (HST 15%), must be in Canadian currency, and shall be firm until the contract has expired. It is the intent that these prices remain fixed until completion and that no contract containing price escalations will be accepted before the anticipated completion date outlined in this RFP.</p>
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7.0 Project Schedule

The project schedule should assume an approximate starting date of September 9th, 2024. The deliverables and activities outlined in the project scope (section 4.0) must be completed by March 31, 2025.

8.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 p.m. on August 27, 2024.

- Proposals should not exceed twenty (20) pages, excluding appendices. Appendices are acceptable as outlined in the summary of qualification and experience in section 6.0.
- 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 RFP Response 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 the following table 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 experience demonstrates the ability to provide requested services	15
2.	Consultant 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. Negotiation sessions may be held to work out contract details and other expectations of the parties applicable to the services/work, based on the RFP and the proposal(s) submitted.

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 who are not successful will receive 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 Atlantic Association of CBDCs 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) 500-4336 (Office) 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. In order 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 submitting 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 own 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 damage and will complete any work unfinished by the subcontractors.

Release of Funds: The following constitutes the release of payment by the AACBDC to the prospective consultant:

1. 10% released upon signing of the contract.
2. 40% released upon completion of the content, promotional materials and presentation.
3. 50% released upon completion of the Roadshow and project final report.

13.0 Intellectual Property and Disclosure

All proposals and any intellectual property 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—shall become the property of the AACBDC. By submitting a proposal, the consultant grants the AACBDC a license to distribute, copy, print, or translate the proposal for the purposes of the project invitation and completion, including sharing with the members and representatives of ATIGS.

All documents submitted by partner agencies shall remain the property of the issuing organization. This information is proprietary and should be treated as confidential. Any information obtained by the consultant through participation in this project is confidential and must not be disclosed without written authorization.