

Request for Proposals
Atlantic Canada Site Certification Program
Site Certification Services

Issue Date: April 8, 2020
Closing Date: May 6, 2020



***Ref 04-08-20**

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

April 8th, 2020

You are invited to review and respond to this Request for Proposal (RFP), entitled ***Atlantic Canada Site Certification Services***. 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 CBDCs, in cooperation with the Atlantic Foreign Direct Investment team (FDI team) of the Atlantic Trade and Investment Growth Strategy (ATIGS), invite interested firm(s) (Consultant) to respond to this Request for Proposals (RFP) for support in providing *Site Certification services to the Atlantic Canada Site Certification Program*.

2.0 Contracting Agency

For the purposes of this contract, the Atlantic Association of CBDCs will be the contracting agency.

The Atlantic Association of Community Business Development Corporations (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 (SMEs).

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 Atlantic Association of Community Business Development Corporations (AACBDC) administers, on behalf of its 41 member CBDCs, a number of programs and initiatives. AACBDC is governed by a volunteer Board of Directors that are 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.

The AGS is harnessing the four Atlantic province's assets to strategically:

- identify shared economic priorities and collaborate on the design and implementation of actions;
- emphasize region-wide measures;
- align actions with national and provincial priorities;
- engage and consult with the region's stakeholders, entrepreneurs, as well as Indigenous, community and industry leaders; and
- monitor progress and report publicly on results.

3.2 Atlantic Trade and Investment Growth Strategy (ATIGS)

One component of the Atlantic Growth Strategy identified to support economic growth is the multi-year Atlantic Trade and Investment Growth Strategy (ATIGS).

The mandate of ATIGS is to: "Expand business activities between Atlantic Canada and international markets, and strategically market the region as a whole by displaying the best Atlantic Canada has to offer the world to attract new investments."

ATIGS objectives include:

1. increase the Atlantic exporter base;
2. increase the value of Atlantic exports;
3. increase the number of Atlantic exporters diversifying into global markets; and
4. increase foreign direct investment (FDI) in Atlantic Canada.

To support this strategy, the federal and provincial partners have signed a joint Atlantic Trade and Investment Growth Agreement. Collectively, the partners will invest \$20 million over the next 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 foreign direct investment in Atlantic Canada. Foreign Direct Investment 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 interest; and,
- encourage the coordination and leveraging of federal and provincial resources in an effort to close more foreign investment deals in Atlantic Canada.

One initiative that has been identified by the FDI team with the potential to aid in the greater facilitation of foreign investment, is an Atlantic Canada Site Certification Program. This program is intended to provide a streamlined and efficient approach for businesses and organizations interested in investing in Atlantic Canada by identifying sites that are "development ready" for corporate occupiers, specifically new businesses to enter the region.

The Atlantic Association of CBDCs is supporting the objectives of ATIGS by assuming responsibility for the implementation and management of the Program.

3.3 Site Canada Certification Program Overview

Site certification is viewed as an effective economic development tool that helps create a competitive edge to successfully and more quickly attract business operations to a given location.

A site certified designation in some jurisdictions such as Ontario, Iowa and North Carolina, is issued to properties that have successfully completed a set of pre-defined program requirements. These requirements demonstrate that a property is primed for development and ready for investment for corporate occupiers to bring new business growth and jobs to the region.

Information is key and providing immediate access to data and other property information helps bring attention and focus to those locations that are ready to capitalize on an investment opportunity for corporate occupiers. An Atlantic Canada Site Certification Program will enhance the region's ability to gain the attention of investors and site selectors and attract companies / corporate occupiers and foreign direct investors to their regions.

The objective of the Atlantic Canada Site Certification Program is to build an inventory of pre-qualified locations/sites that address the needs of investors. These sites receive a designation, after having undergone

due diligence that demonstrates the property has met the standards required to be certified as development-ready, including relevant permitting and zoning. It also helps the local real estate marketplace understand requirements for these foreign direct investors.

With key information in hand, the region is better equipped to compete, and pre-qualified sites can be aggressively promoted to attract FDI. Similar programs exist throughout the US and other jurisdictions, so investors are becoming more familiar with their process and value, which in turn can increase investor engagement opportunities and the region's competitiveness globally.

3.4 Engagement Overview

The Atlantic Association of CBDCs has identified the need for a Consultant(s) with technical knowledge and expertise in certified site selection or site assessment to provide site certification services to the Atlantic Canada Site Certification Program.

While it is not a requirement for responding to this RFP that the Consultant(s) has coverage in all four of the Atlantic provinces, travel may be required to each province.

3.5 Engagement Oversight

The Atlantic Association of CBDCs 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 Atlantic Canada Site Certification Committee, which is comprised of:

- Two representatives from Atlantic Canada Opportunities Agencies (ACOA);
- One representative from Invest in Canada;
- One representative from each of the four Atlantic provinces (e.g. ATIGA members);
- One representative from Project proponent.

4.0 Objectives

The objective of this engagement is to provide site certification services for the Atlantic Canada Site Certification Program throughout the duration outlined in this RFP up to and including March 31, 2022.

To this end, the Consultant will work collaboratively with the Atlantic Association of CBDCs and the Atlantic Canada Site Certification Committee to propose site certification eligibility criteria based on the Provisional Minimum Eligibility Criteria (See Appendix A). In delivering its services, the Consultant will need to take into account the design of the Atlantic Canada Site Certification Program.

4.1 Work Undertaken to Date

In the fall of 2017, the FDI team undertook a feasibility study on an Atlantic Canada Site Certification Program. The feasibility study was completed by Deloitte Inc.

In the spring of 2019, the ATIGS partners undertook a project to design the Atlantic Canada Site Certification Program. Deloitte Inc. was engaged to design the program, generating 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 Canada Site Certification Program.

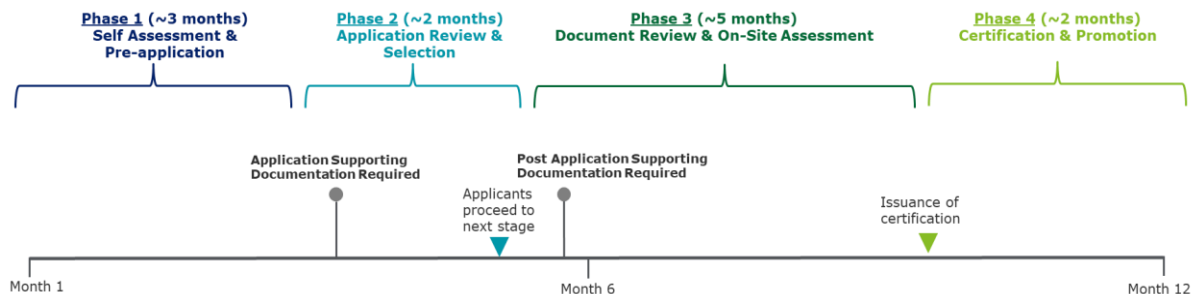
As part of this work, the FDI team developed the following process for the application, review, certification and promotion of certified sites in Atlantic Canada:

Phase:	Activities	Responsible Party	Description
Phase 1 - Identification of sites	1. Call for Applications ¹	Atlantic Association of CBDCs	Atlantic Association of CBDCs issues a call for applications, inviting applications to the Atlantic Canada Site Certification program
	2. Identification of sites	Applicant	Applicant identifies sites that they want to certify
	3. Complete self-assessment	Applicant	The applicant completes self-assessment; the self-assessment is a short questionnaire which collects basic site information and highlights potential gaps in the respondent’s application
	4. Pre-application consultation	Applicant & Atlantic Association of CBDCs	Atlantic Association of CBDCs conducts pre-application consultation with the applicant, outlining the eligibility criteria, application process and application form
	5. Fill in and submit the application form	Applicant	Applicant fills in the application form
Phase 2 – Application Review & Selection (~2 months)	6. Desktop review of the application	Consultant	Consultant conducts a desktop review of the site certification application received and submits rating to the Atlantic Association of CBDCs
	7. Application Selection	Atlantic Association of CBDCs	Atlantic Association of CBDCs selects successful applicants based on the ratings provided by the 3 rd Party Certifier and target quotas. Atlantic Association of CBDCs notifies the applicant of their application results and supporting rationale
	8. Payment of program fee	Applicant	Successful Applicant pays a fee to be accepted into the program
Phase 3 – Doc. Review & On-Site Assessment (~5 months)	9. Submission of post-application supporting documentation	Applicant & Consultant	The Applicant gathers and submits required documentation to the Consultant. Consultant to request additional documentation if necessary
	10. Site Inspection & Document Review	Consultant	Consultant reviews and validates documentation received and conducts an inspection of the site
	11. Selection of sites for certification	Consultant	The Consultant makes a recommendation for the sites that will be certified by the program. The recommendation is reviewed and approved by the Atlantic Association of CBDCs
Phase 4 – Certification & Promotion (~2 months)	12. Issuance of certification	Atlantic Association of CBDCs	Atlantic Association of CBDCs issues certification to newly certified site
	13. Marketing & Promotion of Site	Atlantic Association of CBDCs	Atlantic Association of CBDCs promotes certified site through marketing channels (e.g., program website)

¹The program will launch with a Call for Applications inviting applications to the Atlantic Canada Site Certification Program. As such, it is anticipated that there will be a large volume of applications at the initial launch of the program.

After the initial call for applications, the program will operate on a continuous intake model, i.e., applications are received and processed on an ongoing basis. Each application will be assessed and processed based on the timeline outlined below.

Site Certification Process Timeline



5.0 Project Scope

For this engagement, the project scope will include three activities: (5.1) Launching Site Certification Services, (5.2) Reviewing Site Certification Applications; and (5.3) Document Review & On-Site Assessment.

5.1 Launching Site Certification Services

The first requirement of the project is launching the Consultant's site certification services. This phase will be completed prior to the activities outlined in 5.2 and 5.3 and is expected to include, at a minimum:

- Development of a detailed work plan incorporating all deliverables and services outlined herein (5.1), (5.2) and (5.3). The work plan will outline by task and due date, each activity to be performed under this contract, including the areas of responsibility of the Consultant and the Atlantic Association of CBDs;
- Development of the Consultant's site certification process and protocols in line with the site certification process outlined in 4.1, including:
 - Evaluation criteria for reviewing certified site applications (See Appendix A for the Provisional Minimum Eligibility Criteria). The criteria should ultimately provide a numerical rating for each site, the appropriate scale may be determined by the Consultant in consultation with the Program Manager. The Consultant should provide guidance on how the ratings relate to the probability of a site meeting the minimum criteria for certification;
 - Evaluation criteria for on-site assessments & documentation review;
 - Evaluation schedule and timeline from the receipt of an application to the award of certification;
 - The evaluation criteria and timeline should be reflective of the direction provided by the Atlantic Canada Site Certification Program Guide; and,
- Development of reporting templates to the Atlantic Association of CBDs, including:
 - Template to report the results of the application review, summarizing application ratings and rationale for assigned ratings. The following information should be included:
 - The application received;
 - The type of applicant (categorized by private landowners, municipalities, real estate companies and business parks, etc.);
 - Property ratings and supporting rationale for assigned ratings; and
 - Any additional observations about the Atlantic Canada Site Certification Program.

- o Template to report the status of on-site assessments including the status of the assessment (pass/ fail), and detailed reports on the results of the site assessments.
- o The work carried out by the Site Certification Consultant will adhere to the branding guidelines of the Atlantic Canada Site Certification Program. Ensuring consistency with other deliverables as outlined in the promotional strategy.

All of the deliverables listed in 5.1 must be reviewed and signed off by the Atlantic Association of CBDs before the services listed in 5.2 and 5.3 are launched.

5.2 Reviewing Site Certification Applications

The second requirement of the project is the review of applications to the Atlantic Canada Site Certification Program. This is expected to address the following areas:

- Receipt of applications received by the Atlantic Association of CBDs will distribute the applications to the Consultant;
- Evaluation of applications from landowners, municipalities and business parks interested in pursuing site certification. Applications are reviewed on a continuous basis (see section 4.1 for further details). The Consultant shall conduct a desktop evaluation of applications against the evaluation criteria developed in 5.1; and
- Reporting of the ratings from the application review and supporting rationale using the reporting template developed in 5.1; the Consultant is required to notify the Atlantic Association of CBDs of the results of the desktop evaluation within 4-6 weeks of receiving an application (If more than 50 applications are received within 4 weeks of each other, an extended timeline for the review of applications can be set upon discussion with the Atlantic Association of CBDs.)

5.3 Document Review & On-Site Assessment

The third requirement of the project is the document review and on-site assessment of sites ("successful applicants") that were selected as a result of the application review. This is expected to address the following areas:

- Receipt of applications that were selected during the application review process Atlantic Association of CBDs will distribute the names and details of selected sites to the Consultant after receiving payment from site owners;
- Request and collection of relevant site documentation from successful applicants (The list of relevant documents is listed in Appendix B);
- Review and validation of documentation received from the applicant; ensure that all required documentation has been received;
- On-site assessment of sites that passed the application review process (Consultant should have the capacity to conduct at least 30 on-site assessments per year if required). The Consultant shall conduct an on-site assessment against the evaluation criteria developed in 5.1; and
 - The on-site assessments will validate the information provided by the applicants in the application form. The information to be validated is listed in Appendix C.
- Reporting of documentation review status and onsite assessments, and supporting rationale using the reporting template developed in 5.1; the Consultant is required to notify the Atlantic Association of CBDs of the results of an on-site assessment within 17 weeks of receiving notice

(from the Atlantic Association of CBDCs) that a site has passed the application review process (Phase 2).

- The consultant must have the ability to communicate and/or provide services in both official languages.

6.0 Deliverables and Milestones

Support the marketing of an Atlantic Canada Site Certification Program

The following chart provides a breakdown of the expected role of the Atlantic Association of CBDCs / Atlantic Canada Site Certification Committee and Consultant(s) throughout the engagement.

Engagement Activity	Atlantic Association of CBDCs / Atlantic Canada Site Certification Committee Role	Consultant(s) Role	Estimated Timeline (Examples Only)
Review of program materials	<ul style="list-style-type: none"> • Provide relevant program materials and background to Consultant(s) 	<ul style="list-style-type: none"> • Receive and review program materials to ensure a comprehensive understanding of the Program 	Week of May 18
Face to face meeting kick-off meeting	<ul style="list-style-type: none"> • Attend meeting with Consultant(s) to review objectives, deliverables, timelines and work plan • Be available for Consultant's questions 	<ul style="list-style-type: none"> • Attend meeting with the Atlantic Association of CBDCs and Atlantic Canada Site Certification Committee to review objectives, deliverables, timelines and work plan 	Week of May 25
Engagement work plan	<ul style="list-style-type: none"> • Review and sign off on work plan submitted by Consultant(s) 	<ul style="list-style-type: none"> • Draft and submit a work plan 	Date to be determined that is agreed upon by the Project Manager and Consultant
Launching the site certification program (5.1)	<ul style="list-style-type: none"> • Provide direction to the Consultant(s) as needed • Review and sign off on deliverables submitted by Consultant(s) 	<ul style="list-style-type: none"> • Develop evaluation criteria for site applications and on-site assessments according to the requirements outlined in this RFP • Draft reporting templates for application and on-site assessment status according to the requirements outlined in this RFP • Undertake additional research as required 	Week of July 13
Review site applications (5.2)	<ul style="list-style-type: none"> • (Atlantic Association of CBDCs only) Distribute site certification applications to the Consultant(s) 	<ul style="list-style-type: none"> • Receive site certification applications 	Ongoing

	<ul style="list-style-type: none"> • Review application status reports and notify applicants as necessary • (Atlantic Association of CBDCs only) Validate if successful applicants would like to proceed with the remainder of the application process 	<ul style="list-style-type: none"> • Review and evaluate the applications to the Atlantic Canada Site Certification Program • Provide a report of site application statuses and supporting rationale within 4 weeks of receiving an application 	
Document review & on-site assessment (5.3)	<ul style="list-style-type: none"> • (Atlantic Association of CBDCs only) Notify the Consultant(s) of applicants that would like to continue with the site certification process • Review on-site assessment reports • (Atlantic Association of CBDCs only) Notify applicants of certification status as necessary 	<ul style="list-style-type: none"> • Receive a list of sites that were selected to continue the site certification process • Request and collect relevant documentation from selected applicants • Review and validate documentation received • Schedule and perform on-site assessments • Provide a report of on-site assessment and document review status and rationale within 17 weeks of receiving notice that a site has been selected for document review and on-site assessment 	Ongoing

Please note: Due to the ongoing COVID-19 Pandemic, meetings may be held via video or teleconference.

7.0 Proposal Structure

Table 1: Response Structure	
Introduction	This section should introduce and briefly describe the firm, its capabilities and its experience in handling an assignment of this nature.
Understanding of 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.

<p>Work plan and methodology</p>	<p>This section should include:</p> <ul style="list-style-type: none"> • A description of the Consultant's process and approach to launching its site certification services in Atlantic Canada; • A description of the Consultant's process and approach to application review, selection and ultimate site certification; • A project schedule including deliverables and milestones (the Consultant will be required to make regular oral and written reports to the Atlantic Association of CBDs & Atlantic Canada Site Certification Committee on the progress of the work); • Summary of travel required to complete scope item 5.1 - Launching Site Certification Program. Video/teleconference meetings with the Program Manager will be carried out as required.
<p>Summary of qualifications and experience</p>	<p>This section must include:</p> <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; • A list of key project personnel to be used in the project outlining their roles and responsibilities; • Professional designations toward property appraisal commensurate with the site certification process are desirable, for example, the Accredited Appraiser of the Canadian Institute (AACI) or the Member of the Royal Institute of Chartered Surveyors (MRICS) professional designations; • (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.
<p>Pricing</p>	<p>Pricing is to be detailed out 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 should provide the cost for the engagement and be divided into three categories:</p> <ol style="list-style-type: none"> 1. Launch Fee: Launching site certification services 2. Application Review Fee: Reviewing Site certification applications 3. Document Review & On-Site Assessment Fee: Performing document reviews and on-site assessments <p>(1) <i>The Launch Fee</i> is a one-time fee associated with launching the site certification services as outlined in scope item: 5.1 – Launching Site Certification Services (See section 5.1 of the RFP).</p>

	<p>(2) <i>The Application Review Fee</i> is invoiced periodically by the Consultant, this is associated with the review of site certification applications received, as outlined in scope item 5.2 – Reviewing Site Certification Applications (See section 5.2 of the RFP). Please provide three proposed annual fees based on the number of applications received below:</p> <ul style="list-style-type: none"> • 0 – 20 Applications received & reviewed • 20 – 40 Applications received & reviewed • 40+ Applications received & reviewed <p>(3) <i>The Document Review & On-Site Assessment Fee</i> will be invoiced for each site assessed by the Consultant; this is associated with meeting project scope item 5.3 – Document Review & On-Site Assessment (See section 5.3 of the RFP).</p> <p>Travel costs will only be reimbursed for actual travel incurred and will follow federal guidelines (https://www.njc-cnm.gc.ca/s3/en).</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 prior to the anticipated completion date outlined in this RFP.</p> <p>The Atlantic Association of CBDCs may hold back up to 20% of the Launch Fee, to ensure the products and services meets the requirements specified in the RFP.</p>
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8.0 Project Schedule

The project schedule should assume an approximate starting date of May 18, 2020. The deliverables and activities outlined in project scope item 5.1 – the Launch of Site Certification Services (See section 5.1 of the RFP), must be completed by July 13, 2020. The term of the contract is anticipated to be up to and including March 31, 2022.

9.0 Submission of Proposal and Vendor Information

Proposals must be received by the Atlantic Association of CBDCs contact no later than 4:00 pm on May 6, 2020.

- 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.

10.0 Proposal Evaluation

The Atlantic Association of CBDCs will evaluate the proposals. The lowest-priced proposal may not necessarily be accepted. The Atlantic Association of CBDCs reserves the right to recommend rejection of all proposals and either cancellation 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 7:

Table 2: Selection Criteria		
	Factor	Scoring
1.	Consultant (s) past 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.

11.0 Awarding of Contract

The resulting contract will contain such reasonable terms as the Atlantic Association of CBDCs may require.

Negotiation sessions of the parties applicable to the services/work, based on the RFP and the proposal(s) submitted.

The award of contract will be made by the Atlantic Association of CBDCs, based upon the results of the evaluation of submitted proposals. The Atlantic Association of CBDCs will notify the successful Consultant in writing via electronic means. Those that 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.

12.0 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: 54 Loggie Street, Mulgrave, NS B0E 2G0
Email: joe.brennan@cbdc.ca
Telephone: (902) 747-2232 Ext 202 or (902)631-2397 Cell

13.0 General Conditions

Verbal information or representations shall not be binding on the Atlantic Association of CBDCs. 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 Atlantic Association of CBDCs 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 pursuant to 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, 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 damages and will complete any work unfinished by the subcontractors.

The following constitutes the release of payment by the AACBDC to the prospective Site Certification Consultant:

(1) *The Launch Fee* is a **one-time fee** associated with launching the site certification services as outlined in scope item: 5.1 – Launching Site Certification Services (See section 5.1 of the RFP).

(2) *The Application Review Fee* is invoiced **periodically** by the Consultant, this is associated with the review of site certification applications received, as outlined in scope item 5.2 – Reviewing Site Certification Applications (See section 5.2 of the RFP). Please provide three proposed annual fees based on the number of applications received below:

- 0 – 20 Applications received & reviewed
- 20 – 40 Applications received & reviewed
- 40+ Applications received & reviewed

(3) *The Document Review & On-Site Assessment Fee* will be invoiced **for each site assessed by the Consultant**; this is associated with meeting project scope item 5.3 – Document Review & On-Site Assessment (See section 5.3 of the RFP).

14.0 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 Atlantic Association of CBDs. By submitting a proposal, the Consultant hereby grants the Atlantic Association of CBDs a license to distribute, copy, print or translate the proposal for the purposes of the invitation and completion of the project, including to the members and representatives of ATIGS.

All documents submitted by partner agencies shall remain 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.

15.0 Appendix A – Provisional Minimum Eligibility Criteria

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 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"> Each site must be 1 contiguous acre 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"> Each site must be 2 contiguous acres Total of 10 acres across all sites being certified
Zoning	Zoned for commercial use	Zoned for industrial use	
Environmental Assessment	Environmental Assessment Phase 1 complete		
Transportation	The site must have existing frontage and access from a public right-of-way		

16.0 Appendix B – Document Checklist

Supporting documentation will need to be provided by the applicant, to validate the information provided in the application form. To facilitate the application process and reduce the administrative burden, the collection of documentation is divided into three components:

1. **Application Supporting Documents** – Documentation to be uploaded and submitted at the same time as the application form
2. **Post-Application Supporting Documents** – Documentation to be submitted after an applicant is selected to enter the program
3. **Optional Documents** – Documentation that may not be applicable to all applicants but may be of use in assessing the property. The Consultant may choose to request this information at their discretion

Application Supporting Documents:

- Proof of ownership
- Aerial photo with parcel boundary clearly shown (If aerial photo is unavailable, other options such as a map, or screenshots from Google Maps are also acceptable)
- Building plan/blueprints (If applicable)

Post-Application Supporting Documents:

- Summary of ownership structure and history of the property
- Letter from municipality confirming parcel zoning
- Plan of subdivision that clearly identifies the lot that forms part of the application (for sites within industrial parks only)
- Letter from electrical utility confirming the provision of three-phase power. The letter must be provided on corporate letterhead and be signed by a staff person within the electrical utility who has the authority to provide such information
- Letter from telecommunications provider confirming either: i) The provision of telecommunications services on-site (including details on the type of service available), or ii) The cost and time required to provide telecommunication services to the site. The letter must be provided on corporate letterhead and be signed by a staff person within the telecommunication provider's provisioning department who has the authority to provide such information
- Environmental Site Assessment (ESA) – Phase I: Phase I Environmental Site Assessment conducted; Phase II Environmental Site Assessments are not required for certification, even if the Phase I ESA recommends a Phase II assessment

- (If Municipal Water/ Wastewater is required) Letter from the public works department confirming access to municipal water and wastewater. The letter must be provided on corporate letterhead and be signed by a staff person within the public works department who has the authority to provide such information

Optional Documents:

- Summary of historic capital investment in the property (last 3 years)
- Outstanding/planned capital upgrades
- Business plan/operating projections and budget for 2019, 2020 years if available
- Current and historic operating/profit and loss statements (past three years)
- Current lease documents/rent rolls if applicable
- Previous valuations completed on the property and any other relevant information

17.0 Appendix C – Site Information requiring Verification

The following information will need to be verified by the Consultant as part of the on-site assessment and documentation review.

Site General:

- Address
- Parcel Identifier Number
- Location – site map, property pictures (multiple including interior/exterior for buildings)
- Lot area (Contiguous acres)
- Presence of Building(s)
 - Building areas (sq. Ft) (If applicable)
 - Age of building(s)
 - Current use of the building(s)
- Local municipal planning status
- Current and adjacent site usage
- Presence of any easements, covenants, restrictions and/or rights of way

Site Features:

- Completion of Phase I Environmental Assessment
- Presence of conservation zone
- Presence of mineral resources, aggregate resources and/or petroleum
- Presence of natural hazards
- Presence of natural heritage features
- Presence of source water protection areas
- Presence of cultural heritage and/or archaeology features

Utilities:

- Availability of three-phase electrical power
 - (If available) Capacity of service
- Availability of site water service (Municipal piped water service)
 - (If available) The capacity of water service
 - (If available) Water quality (Meeting safe drinking standards)
- Availability of wastewater service
 - (If available) The capacity for wastewater service
- Availability of internet on-site
 - (If available) Internet speed

- Availability of natural gas on-site
 - (If available) The capacity of natural gas service
- Availability and type of clean energy on-site

Transportation

- Access to public-right-of way
- Vehicle weight restrictions
- Nearest highways & interchange
 - Distance from nearest highways & interchange
- Nearest rail line
 - Distance from the closest rail line
- Nearest commercial airport
 - Distance from the closest commercial airport
- Nearest Port
 - Distance from the closest port