

*Ref 06-04-24 ACA -HI

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

June 6th, 2024

You are invited to review and respond to this Request for Proposal (RFP), entitled The ***Atlantic Canada Advantage – Health Innovation***. 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) to develop value proposition(s) and a suite of assets for the Health Innovation sector for the Atlantic Canada Advantage Program in both official languages. The assets include the development of a sector video, digital ads, print ads, sector sheets, and pitch book, along with information added to Atlantic4.ca.

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 Atlantic Canada Advantage Project Overview – Atlantic4

In today's global economy, countries, provinces, and cities around the world are looking at ways to drive the economy forward. This is not an easy task, and it is very difficult to stand out globally, however, Atlantic Canada has a long history of hardworking and innovative people. All that said, incredible infrastructure was developed delivering people and products from the ocean to central and western North America. Governments had to be nimble to meet the growing demands and ever-changing influx of people and commerce. This is a strength to this day and the foundation pieces that have allowed billion-dollar companies to call Atlantic Canada their home. These companies have stayed and continue to grow around the world, i.e., McCain's, Irving, Cavendish, Cooks, CHC Helicopters, Empire Companies, Provincial Aerospace Limited, Verafin (a Nasdaq Company), and the list goes on. Why do they stay and grow? It is the people, innovation, infrastructure, and agile economies.

Atlantic Canada is not a big region when compared to other Foreign Direct Investment (FDI – "incoming" investment into Canada) competitors. However, the four provinces combined are very well positioned, if they work together, to enhance the regions' strengths and competitiveness on the global stage. It is well known that while the individual FDI value propositions for the four provinces can be very similar in many ways, each province also has its unique strengths that can be complimented by one or more of the other Atlantic provinces, thus providing an opportunity to create overarching Atlantic Canada value propositions that present stronger cases for FDI in the region.

It is for the reasons noted above that in 2021 the group embarked on an initiative to create an overarching FDI value proposition for Atlantic Canada with additional deeper dives into value proposition development for the Oceans, Aerospace & Defence, and Cybersecurity sectors as these are the sectors in which each Atlantic Province has the capacity and can add value to the creation of a stronger value proposition for potential investors.

In 2023, the FDI team added Energy Innovation as a new sector to the Atlantic4 Program. Now, we are looking to add Health Innovation as a new sector of focus to the program.

The Atlantic Canada value propositions highlight the strengths of the region, some of which include but are not limited to:

- A population of over 2 million for investors to draw from for a workforce.
- A diversified supply chain.
- A variety of world-class universities and colleges that provide different training, research, and development opportunities.
- Multi-faceted and interconnected world-class infrastructure with ports, roads, rail, air, and data networks.
- Support of governments who have clear strategies focused on growth sectors that will drive the economy of the future.

The value propositions and the strategic work plan will be used to tell the story of Atlantic Canada as a premier destination of choice for FDI and can be used:

- To provide a stronger rationale for FDI in the region as the overarching value propositions for the Atlantic region as a whole present a stronger case for FDI than each province individually.
- To complement the information already existing in the Invest in Canada platform.
- In investment-attracting activities that are undertaken collectively by all Atlantic Canada partners or individually by provinces.
- To educate Global Affairs Investment Officers around the world on the investment opportunities Atlantic Canada can offer foreign firms.
- To complement the sites certified through the Atlantic Canada Site Certification Program.

During the first phase of the Atlantic Canada Advantage project, the FDI team retained a consultant who gathered information from partners, and stakeholders and engaged with sector-experienced consultants that provided a deeper insight into the value proposition development for the oceans, aerospace & defence, and cybersecurity sectors. The research was used to assist the consultant in developing overarching value propositions and a strategic work plan. For a summary of the key findings from the first phase of the project please refer to Appendix C attached to this RFP.

In the second phase of the project, the FDI team retained a consultant to develop a suite of assets for the oceans, aerospace & defence, and cybersecurity sectors. For a sample of the creatives that were developed as part of phase 2 please refer to Appendix D of this RFP.

A follow-up project in the fall of 2022 and winter of 2023 saw enhancements to the Atlantic4.ca website and an in-market media buy to begin promotion of the Atlantic4 sectors to targeted audiences around the globe. For details on the results of the campaign please reference Appendix E of this RFP.

In 2023, with the continuation of the Atlantic4 Program, the team added Energy Innovation as a sector of focus. With the addition of Energy Innovation sector, a suite of marketing assets was developed for that sector that included a sector video, digital ads, print ads, sector sheets, and pitch book, along with information added to the Atlantic4.ca website.

3.4 Engagement Overview

The AACBDC has identified the need for a consultant to develop value proposition(s) and a suite of assets for the Health Innovation sector for the Atlantic Canada Advantage Program in both official languages. The assets include the development of a sector video, digital ads, print ads, sector sheets, and pitch book, along with information added to the Atlantic4.ca website.

The Health Innovation sector in Atlantic Canada focuses on advancing healthcare solutions and fostering

collaboration between health-tech companies and healthcare organizations. Specifically, the CAN Health Network plays a crucial role. It's an integrated market that facilitates the adoption of Canadian healthcare innovations. Here are some key points:

- **CAN Health Network:** The network expanded into Atlantic Canada with a more than \$2.2-million investment for the Horizon Health Network through the Atlantic Canada Opportunities Agency (ACOA). It aims to identify promising Atlantic companies for commercialization projects, bringing innovative solutions developed in Atlantic Canada to scale across the country and abroad.

In summary, the Health Innovation sector supports collaboration, commercialization, and scaling of healthcare products within Atlantic Canada and beyond. It's all about advancing health outcomes through innovation!

The definition of Health Innovation and identifying its sub-sectors of focus will be one of the first tasks of the consultant prior to the value proposition and asset development.

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

4.0 Project Scope

The project scope will include the following two 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 Incorporation of the Health Innovation Sector

Utilizing the previous work conducted on the Atlantic Canada Advantage Program perform the following key objectives:

- Liaison with the Program Manager, and FDI team to ensure consistency, and no duplication of effort.
- Review the current value propositions for the oceans, aerospace and defense, cybersecurity and energy innovation sectors and ensure alignment and consistency when developing the value proposition for the health innovation sector.

- Defining health innovation and sub-sectors of focus for this project.
- Defining the proof points and value proposition for the health innovation sector.
- Once the value proposition for the new sector is approved by the FDI team, begin development of the marketing assets to be added to the Atlantic Canada Advantage Program in both official languages. Those include the development of a video, digital ads, print ads, sector sheets, and pitch book, along with information added to Atlantic4.ca.
- Once the marketing assets are developed and approved by the FDI team the consultant will be responsible for developing a marketing strategy with objectives and tactics used by the FDI team to promote the Atlantic Canada Advantage Program. The strategy will utilize the optimal mix of marketing channels to promote the five sectors of focus to different audience personas around the globe. The marketing strategy will be accompanied by a recommended media buy budget from the consultant for the FDI team to consider.

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	July 2024
Engagement of Consultant	Commencing the week of July 22
Defining health innovation and sub-sectors of focus for this project	Commencing the week of July 29
Defining the proof points and value proposition for the health innovation sector	Commencing the week of August 26

5.2 Assets – Health Innovation	September - December 2024
Asset Development – Health Innovation	September - December 2024

5.3 Marketing Strategy	December 2024 – January 2025
Marketing Strategy Development – Atlantic4	December 2024 – January 2025

5.4 Final Report	January 2025
Completion of the project final report and presentation	January 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.
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 will have demonstrated a good understanding of the work to be undertaken.

<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"> • Defining Health Innovation and sub-sectors of focus for this project. • Development of the value proposition(s). • Development of various marketing assets for the Health Innovation sector in both official languages. • Incorporation of the information within the Atlantic4.ca website. • Media buy execution and final reporting. • 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 must 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 (if applicable). • Other costs. <p>This section must provide the total cost for the engagement and be divided into the following categories:</p> <ul style="list-style-type: none"> • Project kickoff. • Defining health innovation and sub-sectors of focus for this project. • Defining the proof points and value proposition for the health innovation sector. • Development of marketing assets- Health Innovation in both official languages. • Marketing strategy development. • Final reporting and presentation. <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> <p>The AACBDC may hold back up to 20% of the total project cost, to ensure the products and services meet the requirements specified in the RFP.</p>
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7.0 Project Schedule

The project schedule should assume an approximate starting date of July 22nd , 2024. The deliverables and activities outlined in the project scope (section 4.0) must be completed by January 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 July 5th, 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; and,
- 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:

	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 development of the sub-sectors, proof points and value propositions.
3. 50% released upon completion of the development of the various assets for the Health Innovation sector and upon completion of marketing strategy and project 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 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 the property of the issuing organization. All information is proprietary and as such should 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.