

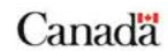


FDI Site Selector Campaign



Request for Proposals

August 2022



***Ref 22-08-22**

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

August 22nd, 2022

You are invited to review and respond to this Request for Proposal (RFP), entitled the ***FDI Site Selector Campaign***. In submitting your proposal, you must comply with these instructions.

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

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

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

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



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1.0 Introduction

The Atlantic Association of Community Business Development Corporations (AACBDC) invites interested firm(s) (Consultant) to respond to this Request for Proposals (RFP) providing services related to the development and implementation of a targeted foreign direct investment (FDI) site selector campaign for the Atlantic Canada region.

2.0 Contracting Agency

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

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

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

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

3.0 Background

3.1 Atlantic Growth Strategy

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

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

3.2 Atlantic Trade and Investment Growth Strategy (ATIGS)

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

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

- Increase the number of Atlantic firms engaging in international business activity;

- Increase the capacity of Atlantic firms to strategically enter new, sustain or increase their activity, in international markets; and,
- 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) 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. 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 Oversight

The AACBDC's Program Manager will 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 sought from the FDI Team as required. The FDI Team is comprised of:

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

4.0 Project Scope

The AACBDC will engage a consultant who will develop and implement a targeted site selector campaign. The campaign will target site selectors throughout North America and Europe who have potential clients seeking investment opportunities in the Oceans, Cybersecurity and

Aerospace and Defence sectors. Site selectors with clients seeking investment opportunities in other sectors in alignment with Atlantic Canada's key sectors of interest will also be considered.

It is expected that the consultant engaged to undertake this project will include various phases and reporting:

Phase I

- Attend a project kick-off discovery meeting with the FDI Team before the project start
- Review all materials created with the Atlantic Canada Advantage Project – Force 4)
- Meet with provincial EDOs to gain a comprehensive understanding of each province's investment value propositions and become aware of the work each province is currently undertaking with site selectors.
- Meet with the FDI marketing consultant who is engaged by the AACBDCC to determine synergies and ensure there is no duplication of effort.

Phase II

- In consultation with the FDI Team develop the criteria required to qualify potential site selectors.
- Utilize a site selector directory and/or database to identify potential and relevant site selectors of relevance to Atlantic Canada. The result/goal of this deliverable would be to qualify site selectors (*Estimated 400 – 600 site selectors*) This list will be vetted by Invest in Canada and each of the provinces before contact is made with site selectors.
- Contact the approved list of site selectors and provide them with the appropriate Atlantic Canada value proposition information.

Phase III

- Establishing meetings with interested and relevant site selectors. (*Estimated 15-20 meetings established*).
- Develop appropriate meeting materials in consultation with IIC and relevant province(s). Hold meetings with each site selector, IIC and relevant province(s)
- Identify potential investment project(s). (*Estimated 1-2 FDI project opportunities identified for follow-up*).

Reporting:

- Provide weekly updates to AACBDC's Program Manager.
- Engage with federal and provincial EDOs as required.
- Provide a detailed final report summarizing all campaign activities and successes achieved as a result of the campaign.
- Meet with the FDI Team to provide an overview of campaign results.

5.0 Deliverables and Milestones

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

Project Kick-Off and Discovery	September 2022
Engagement of Consultant	September 2022

Targeted Site Selector Campaign	September – January 2023
Targeted Site Selector Campaign	September 2022 - January 2023
Development of a detailed exit report summarizing the success of the campaign	January 2023

6.0 Proposal Structure

Table 1: Response Structure	
Introduction	This section should briefly describe the firm, its capabilities, and its experience in overseeing an assignment of this nature.
Understanding the issue	This section should explain the Consultant's understanding and interpretation of the objectives and requirements of this project. The successful Consultant(s) will have demonstrated a good understanding of the work to be undertaken.
Work plan and methodology	This section should include the Consultants work plan, methodology and understanding of the objectives and tasks outlined in section 4.0 above.
Summary of qualifications and experience	<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. • (If applicable) a list of any subcontractors (individual or organization) that the Consultant intends to use when providing services under this RFP. • Corporate profiles and short-form résumés of key project personnel, as well as references for related work to be included as an appendix. Provide

	two reference projects where the company has undertaken work of similar scope and scale.
Pricing	<p>Pricing is to be detailed in a table and should include:</p> <ul style="list-style-type: none"> • All professional fees broken down for each phase and reporting, with Phase III quoted for each meeting established and held. • Travel costs (if applicable) for face-to-face meetings. • Other costs.

7.0 Project Schedule

The project schedule should assume an approximate starting date of September 26th, 2022. The term of the contract is anticipated to be up to and including March 31st, 2023.

8.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 pm on September 16th, 2022.

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

9.0 Proposal Evaluation

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

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

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

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

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

10.0 Awarding of Contract

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

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

11.0 Contact

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

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

Name: Joe Brennan

Organization: Atlantic Association of CBDCs

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

Email: joe.brennan@cbdc.ca

Telephone: (902) 747-2232 Ext 202 or (902) 631-2397 Cell

12.0 General Conditions

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

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

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

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

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

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

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

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

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

1. 20% released upon signing of the contract.
2. 80% released upon presentation and completion of the site selector campaign.

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.