

Request for Proposals
For Matchmaking and Organizational Services
Atlantic Canadian Trade Mission to Costa Rica and Panama

Deadline: May 19th, 2022, 5:00pm AST

Project Background

Atlantic Canada has been successfully leading trade missions to the Caribbean and Latin America over the last number of years. In fall of 2020 a virtual trade mission was organized to Costa Rica and Panama with 13 companies participating. In an effort to maintain the business relationships forged during this mission, the Nova Scotia Association of Community Business Development Corporations (the Association), in partnership with The Atlantic Canada Opportunities Agency (ACOA), will host an in-person trade mission to Costa Rica and Panama in November 2022 (pending COVID-19 travel restrictions). In past trade missions, delegates represented a variety of sectors including: education, energy, paper, seafood, tourism, oil & gas, engineering, construction, healthcare, and pharmaceuticals. We are expecting that among the delegates a variety of sectors will be represented again.

The objective of this request for proposals is to retain qualified consultants to provide the services outlined below. The selected consultant will provide each participating Atlantic Canadian delegate with the opportunity to meet with pre-qualified contacts in Costa Rica and Panama while benefiting from the exposure of participating as a part of a Pan-Atlantic group.

The contracted project will include matchmaking services, language translation, logistic support and market briefings.

The Association and ACOA will serve as the project committee. They will oversee this project and work with the successful consultant in the recruitment of company delegates, approve applicants and determine the best fit for the companies. The project will comprise of a rigorous recruitment strategy that will target between 10 to 12 delegate participants. Companies may choose to participate in both markets or may focus in only one. The successful consultant will have demonstrated business experience in the Costa Rican and Panamanian market and extensive experience organizing one-on-one meetings for business delegates, event management expertise and a proven roster of contacts in Costa Rica and Panama. The successful consultant will also provide information on what they feel would be their value add to ensure the success of the project. The project committee may choose to re-engage the successful consultant for a follow up mission in 2023, based on the satisfactory execution of the events in 2022.

Scope of Services Required

Under the Association's management, the consultant will be responsible for:

- Playing a key role in the Atlantic Canadian delegate recruitment;
- Company profiling and consultation in advance of the Mission to understand the delegates' goals and objectives. This also includes verifying vaccination/health protocols and ensuring delegates meet the requirements for travel to Costa Rica and/or Panama;
- In advance of the Mission, providing weekly updates (or as otherwise agreed to) to the project committee by telephone, email, video conference or in person on the status of the matchmaking and any challenges which may arise;
- A systematic prospecting campaign on behalf of each mission delegate to schedule a minimum of five (5) one-on-one meetings per market with qualified prospects over the period of the trade mission. If only one market is selected than a minimum of seven (7) meetings are required. It is expected that meetings with trade commissioners will be organized, however, these will not count towards the five (5) pre-qualified meetings;
- Providing delegates with profiles of the organizations/institutions/people with whom they will be meeting in advance of the mission (to include website, address, contact, brief institution profile and an explanation of why the meeting is important to the delegate's goals);
- Providing individual meeting schedules to delegates at least 7 days prior to their departure (meeting schedules will also be made available to the Trade Commissioners in advance of arrival in-market);
- Presenting a 45-minute overview of Costa Rica and Panama's business environment and opportunities/approaches to new companies attending the Mission. The presentation will be delivered to delegates 2-3 weeks in advance of the Mission and will be delivered virtually;
- Creation of a master document tracking all meetings, including time, place, and all pertinent contact information, to be shared with the Association and ACOA;
- Identification of conflicts of interest and addressing these conflicts. This could include situations arising from two or more delegates seeking the same contact(s);
- Coordination, price sourcing and oversight of language translation and interpretation services. The cost of language translation and interpretation services will be paid by the Association through ACOA funding;
- Coordination, price sourcing, and oversight of the host hotel and ground transportation logistics. The cost of hotels will be paid by delegate companies, and ground transportation will be paid by Association through ACOA funding;
- Contribution to guest lists for an in-market reception and assistance in coordination of this reception;
- Providing an in-country briefing upon arrival in Costa Rica and Panama to best prepare the delegates for their meetings (source and price meeting room and logistics);

- Creating a contingency plan for a move from in-person to virtual should a new COVID-19 variant emerge resulting in travel restrictions to international destinations.
- Post-Mission follow-up with delegates to debrief on experiences and suggestions for future initiatives; and
- Prepare a detailed final report within thirty days of completion of the debrief, but not to exceed 60 days post-Mission.

Schedule

The Trade Mission is expected to take place November 16th – 23rd, 2022. The project committee may choose to re-engage the successful consultant for a follow up mission based on the satisfactory execution of the 2022 Mission. Decision will be made by the committee upon submission of the final report from the consultant. The dates of the pre-mission briefing, and follow-up activities are to be confirmed in collaboration with the selected consultant.

Proposal Submission

Submission procedures are to be followed by all proponents. Proponents are cautioned to carefully read and follow the procedures required by this Request for Proposal, as any deviation from these requirements may be cause for rejection of the submission. The proposal must be signed by the person(s) authorized to sign on behalf of the proponent and to bind the proponent to statements made in response to this Request for Proposals.

The proposal should include the following:

- The main body of the Proposal will be a maximum of 15 pages. Appendices are excluded from this page count but should be relevant supporting documents: Curriculum Vitae of staff directly working on the project, company profile, and references are examples;
- Introduction to the Contractor including its primary focus of business, services offered, and client base;
- Clear demonstration of background and previous experience working in-market in Costa Rica and Panama should be demonstrated. Preference will be given to more recent (five years) relevant work in-market & market partnerships;
- Identification of the contractor's capabilities across multiple sectors as it is expected there will be significant diversity in the group of participating companies;
- Clear identification of the lead contractor including their role and scope of work. Up to date Curriculum Vitae as an Appendix is required;
- Clear identification of any sub-contractors including their role and scope of work. Up to date Curriculum Vitae as Appendices are required for all sub-contractors;
- Outline of how services for the Mission will be delivered, including the management of communications with project committee, delegate companies, and target market contacts;
- Methodology for identifying key prospects for delegate companies;

- Identification of potential challenges anticipated for the Mission and potential strategies to overcome these challenges including competitive conflicts between delegate companies;
- Identification of technology platforms, innovative approaches or services that are unique to the contractors proposal, including details of these services and how they will be delivered;
- As an Appendix, please provide the names of former clients for whom similar or relevant work has been performed should be presented as references, as well as a description of the work completed including the results achieved;
- Detailed project work plan with associated timelines and deliverables;
- Detailed project budget. Please include in your quotation any administration expenses – technology, telephone, etc. Final contract price will be determined by number of companies participating. It is expected that ten (10) to twelve (12) companies will be recruited for the mission.

The consultant must disclose all major activities that they have contracted to occur within the one-month period prior to the mission, and one month subsequent.

Proposals must be received no later than 5:00pm AST, Thursday May 19th, 2022.

Proposals must be submitted electronically to:

Erinn Smith
Executive Director
NS Association of CBDCs
erinn.smith@cbdc.ca
Ph: (902) 384-3346

Evaluation Process

The successful contractor will be selected based upon the following criteria:

	Category	Description	Score
1	Matchmaking	Does the proposal describe a team of experienced individuals with relevant skills that will be engaged in the support and execution of this project. Do they have experience in developing, coordinating and managing mission logistics and matchmaking activities, international trade, any specialized skills, logistics, language, market practices and cultural behaviors. Is a CV for each team member and a clear description of roles and responsibilities in the project included.	10
2	Target Market Fit	The applicant has demonstrated its project team's relevant in-market experience and in-market contracted partners, to effectively generate strong in-market matches, utilize in-market contacts and its ability to execute the project logistics effectively in the target market. The proposal has defined a list of at least 5 relationships from specific projects with individuals and organizations in the target ecosystem.	8
3	In market Matchmaking Leadership	The applicant has defined the lead team member for the in-market mission and highlighted skills, experience and competence to multitask, coordinate and manage mission activities. Characteristics such as human relations skills, diplomacy, ability to coordinate resources, contractors, logistics, dynamic B-2-B agendas, to support the project and delegate's success in-market.	6
4	Operational Innovation	Has the applicant proposed specific innovations, such as software, applications, communications tools, shared documents, training and mentoring processes, customized processes or templates that are unique to their service that will advance the efficiency or effectiveness of the project.	4
5	Sector Experience	Has the applicant demonstrated its experience, background and skills in a variety of sectors?	2
6	Project Methodology	Has the applicant provided a clear overview of the methodology proposed to meet the project deliverables? Including the plan for translation, technology, recruitment, matchmaking, etc.	4
7	Atlantic Canadian Business Acumen	Does the proposal highlight the applicant's background and knowledge of the Atlantic Canadian business economy, business environment, culture, strengths and challenges. Provided list of companies, missions and organizations they have worked with in the last 5 years within Atlantic Canada.	4
8	Proposal Clarity, Comprehensiveness and Compliance	Did the proposal provide a clear and succinct understanding of the details. Specifically, did it detail the Team, team roles and responsibilities, timelines, project plan, financial details and identified how the proposed plans to work with the strengths, weaknesses, opportunities and threats for the mission. The proposal should not be more than 15 pages before the appendix.	8
9	Cost	Did the proposal bid amount come within the expected target budget?	10
10	References	The applicant has provided a list of four mission references, incorporating the in-market team lead from the last 4 years.	4
		Total	60

Budget

The budget for this project is up to a maximum of \$64,000 CAD plus HST.

For budgeting purposes, the contractor should develop and present its fee schedule with a base amount and a sliding scale based on number of delegates registered to attend. Final contract price will be determined by number of delegates participating. It is expected that between ten (10) and twelve (12) companies will be recruited for the mission.

Please include in the quotation any travel and administration expenses as no travel or administration expenses will be reimbursed separately from the contract price. Please include a note in the budget explaining what implications a move to a virtual mission would have on the cost (virtual would only be considered if international travel regulations change).

*The best value bid will be selected, not necessarily, the lowest cost bid.

Payment schedule is as follows:

- 25% upon signing of contract;
- 50% upon submission of final matchmaking schedule;
- 25% holdback paid upon satisfactory completion of the project.

Any questions related to the Request for Proposals may be directed to:

Erinn Smith

Erinn.smith@cbdc.ca

Ph: (902) 384-3346