



REQUEST FOR PROPOSAL

CREATION OF INDUSTRY/SECTOR PROFILES FOR CAEP REGION IN CENTRAL ALBERTA TO BE USED BY MEMBER MUNICIPALITIES

SUBMISSIONS TO THIS REQUEST FOR PROPOSAL (RFP) MUST BE RECEIVED BY:

4:00 P.M. MST on Monday, June 18, 2018

ATTENTION: Central Alberta Economic Partnership
Ms Kimberley Worthington, Executive Director
info@caepalberta.com

and mailed to: 5013 – 49 Avenue
Red Deer, AB
T4N 3X1

LATE SUBMISSIONS WILL NOT BE ACCEPTED

NOTE: CAEP WILL NOT ACCEPT FAXED SUBMISSIONS FOR THIS PROPOSAL. EMAILED SUBMISSIONS MUST BE IN PDF and FOLLOWED WITH 2 HARD COPIES MAILED TO THE ABOVE, **POSTMARKED NO LATER THAN June 18, 2018.**

1. The Client

The Central Alberta Economic Partnership Ltd. (CAEP) is a Regional Economic Development Alliance (REDA) with approximately 50 Central Alberta Municipal and Associate members. Our mission is to *“empower our communities to enhance sustainable regional economic development”*. Our current website can be viewed at www.caepalberta.com.

CAEP’s current four-year Strategic Plan can be found at: <http://www.centralalberta.ab.ca/wp-content/uploads/2016/05/CAEP-Strategic-Plan-2016-2019.pdf>

The current strategic plan focuses on four main priorities:

Influential Relationships

We are catalysts for collaborative, community-minded relationships focused on advancing sustainable, regional development.

- We seek out and nurture relationships with municipalities, institutions, business, associations, and individuals with a passion for and commitment to economic development.
- We foster relationships around the values of our organization and in the interest of delivering our mission and working toward our vision.
- We create networking opportunities that cultivate connections and enable collaboration between municipalities, institutions, associations, and businesses.

Knowledge-sharing and Resources

We create, share, and foster knowledge-sharing and the use of economic development tools to ensure communities are enabled and supported to advance innovative practices and prosperity.

- We engage thought leaders to share their knowledge, experience, and stories with our members.
- We foster a community of practice for economic development professionals to engage and learn from one another.
- We work with Alberta’s community of Regional Economic Development Alliances to identify, test, and adopt effective tools, technologies, and practices that support economic development.
- We deliver a Community Economic Indicators Report and a Community Investment Readiness evaluation process to strengthen Central Alberta communities’ economic development opportunities.

Capacity Building

We create learning and training opportunities, lead research, and identify regional trends that enable communities, including their economic development professionals, to identify, pursue, and achieve economic development opportunities.

- We develop, identify, and deliver training opportunities, with a focus on business attraction, retention, and expansion as well as succession planning.
- We coordinate research that has the potential to inform and enable our communities to identify and pursue economic development opportunities.
- We create opportunities to identify regional trends and challenges to inform decision-making.

Reflecting Regional Interests

We work to understand and reflect the collective and unique interests of our region and communities, sharing, promoting, and actively representing our opportunities, successes, and desired outcomes.

- We share a common purpose and work together to accurately and actively position our region for its strengths, merits, and opportunities.
- We are the go-to source and authority for information and advice, to share challenges, successes, and best practices, and to work in pursuit of innovative and rewarding opportunities.
- We are an active conduit to share and showcase opportunities, innovation, and achievements between all levels of government, institutions, businesses, and professional associations
- We are a regional voice and actively reflect and advocate for the interests of our region with provincial and federal representatives and decision-makers.

Through these 4 Areas of Focus CAEP aspires to **Build, Promote, and Engage** the central Alberta region.

2. The Project

Background: In 2017, CAEP created and distributed to its membership a tool – the Regional Investment Attraction Matrix - for member municipalities to utilize in advancing their “boots on the ground” economic development efforts.

Through a working group we identified 12 industry sectors relevant to Central Alberta, along with weighted factors that those industries consider crucial and important to site selection and business success. The Regional Investment Attraction Matrix was then developed as a tool to help communities:

- Assess their strengths and weaknesses and determine their appeal to site selectors representing specific industries.
- Review site selection inquiries by cross-referencing the industry needs with the matrix to determine if their community meets the high-priority factors of that industry.

- Respond to the appropriate site selection inquiries or decide if their economic development resources might be better allocated elsewhere.

The tool also provides information to council for long-term infrastructure and land planning.

As a follow-up to the Regional Investment Attraction Matrix project, CAEP now wishes to examine a number of industry sectors for deeper analysis. The finished industry sector profiles will consist of a breakdown of each of these industry's requirements, providing in-depth industry specific at both the micro and macro level, where relevant. The analysis of the industry sector is to include, yet is not limited to;

- Where it came from
- Where it is going
- Forces affecting the industry
- Needs of the industry
- Financial data
- Industry leaders (regional, provincial, national, and international – where relevant)

New and future industry sectors that show strong continued performance as well as potential for significant growth will be considered for inclusion within the project. CAEP is a large geographic region and any analysis should include the entire CAEP region.

Many Central Alberta municipalities will benefit from a detailed analysis of industry sectors to help them better understand what they could successfully attract including the needs of industries and businesses. These profiles will be multi-faceted. Municipal members will use these profiles for investment attraction, business expansion and diversification, and to understand the technical adaptation needs of business/industry. They will be a compliment to the marketing collateral a community and the region already has in place for investment attraction. The profiles will highlight regional assets and if there are specific communities within the region with infrastructure and labour pool already in place, their sub-region ought to be mentioned in the profiles. The Regional Investment Attraction Matrix will be a key tool to assist the successful proponent to help Central Alberta communities' better focus on developing those infrastructure items that would best fit the needs of industries suited to their specific locations.

We have a prioritized list of 15 industry sectors to be analyzed. Part of the response to this RFP will include the number of in depth sector profiles you will be able to provide within the budget. This information must be presented in an easily-comprehensible format that CAEP can interpret into a high quality designed profile report. (see Section 3 – Deliverables).

3. Project Areas and Deliverables

The CAEP Industry Sector Profiles must at minimum meet the following criteria:

- Data based on up-to-date consultations with industry representatives and site selectors.
- Consultation with CAEP region and members, including associate members, where relevant
- Confidential use of the CAEP Regional Investment Attraction Matrix

- Identify the number of profile reports you can accomplish within the allocated budget.
- Easily-discernable document that allows CAEP to interpret the data and transfer into easy to use profile reports Final documents will be provided in a text-based format with any tables, graphs, or data included as easily-manipulated working files. Design and layout is not included as part of this RFP.

4. Project Timeline

- Proposals must be received by **4:00 p.m. Monday June 18, 2018**. The successful applicant (contractor) will be chosen by **the end of June 2018**. Work should begin immediately and be completed no later than **October 30, 2018**.
- Proposals must be submitted to the attention of the Executive Director at info@caepalberta.com in PDF format with date clearly marked. Proposals must also be submitted in print format (2 copies), mailed to CAEP, 5013 49 Avenue, Red Deer AB T4N 3X1 postdated no later than **June 18, 2018**.
- The successful applicant should be prepared to meet with the project lead for an initial meeting. This can be by teleconference or videoconference, if more reasonable. The project lead will deal with any questions or concerns that arise prior to that meeting.
- Proposal costing should allow for a number of meetings and consultations with the CAEP team. These meetings can be managed with technology if the contractor is geographically removed from the region.
- The completed sector profiles should be delivered no later than Tuesday, October 30, 2018, in time for graphic design to be completed before grant deadline requirement of December 2018.
- The contractor must indicate their ability to meet the client's project timeframe in their submission.

5. Project Team

- The contractor must identify the members and credentials of their project team for this RFP and previous experience in undertaking and completing projects of this nature.
- The contractor must identify at least three previous clients with their contact information as current references.
- The contractor, in response to this RFP, will indicate the time each respective team member will spend on the project and this shall be reflected on the project timetable.
- The contractor will identify their project team leader, liaison personnel and alternates. Please include an organizational chart that indicates the role of each in the project.

6. Project Meetings

- The contractor must be prepared to attend, at their expense and if required, a RFP submission review meeting with the CAEP team for purposes of clarifying their submission to the client. This may be completed remotely, if necessary.
- The location of client-based project meetings will normally be scheduled in the community of Red Deer and the contractor shall ensure that sufficient quantities of presentation materials to be discussed are

available to meeting participants. Coordination of such meetings shall be with the client's project manager.

- All efforts will be made to keep these costs limited and technology based communication will be used whenever appropriate.

7. Project Budget

- The CAEP Board of Directors allocated up to \$20,000 in the 2018-2019 fiscal year budget to complete industry sector profiles. This does not include GST.
- The project does not include profile report layout or graphic design as we will do this portion, in house.
- The contractor will provide a total project fee to complete the project as described with an itemized breakdown of all features listed in Article 3 of this document. The fee shall include all expected disbursements.

8. Project Administration

Team CAEP:

- Kimberley Worthington, Executive Director (Primary Project Lead)
- Ken Kowalchuk, Community Liaison Coordinator
- CAEP Sector Profile Working Group

9. Final Deliverables

Upon completion of the project, CAEP should have Industry Sector Profile documents adhering to the criteria set out in Article 3 (Project Areas and Deliverables) of this document. Please include in your proposal any value added you may bring to the table.

10. RFP Evaluation Criteria

The CAEP Sector Profiles Working Group will evaluate each contractor's proposal based on, at minimum, the criteria listed below. Suitable proposals will be shortlisted and evaluated by CAEP's Sector Profiles Working Group. These factors will be weighted in the following order:

- Relevant experience of firm and sector profile development team in successfully completing similar work (please include references relative to sector profile development and innovation).
- Demonstrated understanding of the CAEP project, issues identified and the ability to meet project timeframe.
- Ability and willingness to work with CAEP graphic designer on development of profiles
- Estimate of cost, based on person-hours and disbursements (note: the lowest cost will not necessarily be selected).
- Added-value provided to project budget.

11. Professional Responsibility

The contractor shall comply with generally accepted standards and legislation for similar consulting work and ensure permission is received and acknowledgement given to material sources as may be required.

12. Terms of Payment

All payments will be determined upon acceptance of interim and final products by CAEP and the Project Manager and on receipt of a proper written invoice.

13. Confidentiality

The contractor may be required to enter into confidentiality agreements with sources of information.

14. Proposal Rejection

CAEP reserves the right to reject any and all proposals submitted under this RFP. Lowest cost will not be the sole determining factor for selection.

15. Incurred Costs

CAEP shall not be liable for any costs of preparation or presentation of proposals supporting the contractor's bid for this RFP.

16. Proposal Alteration

If at any point during the course of the work being performed under this RFP the contractor considers that the project figure will be exceeded either by unforeseen circumstances or changes in the terms of reference or activities, the client shall be notified immediately in writing of the details and costs.

At no time shall the contract fee be exceeded or the deliverables changed without the express written consent of the client.

17. Contract

The successful contractor to this RFP shall be prepared to enter into a Service Contract Agreement with CAEP to perform the work necessary to provide the deliverables within the timeframe identified and at the stipulated price.

18. Contact

For more information, please contact info@caepalberta.com or call 403-357-2237 and reference *sector profiles RFP*.
