



## **Community Futures Yellowhead East Request for Proposals**

### **Regional Business Diversification Strategy Plan**

#### **A. Introduction & Background**

Community Futures Yellowhead East (CFYE) is a federally funded non-profit organization that helps rural entrepreneurs and small business owners start, expand or sell their business, through services such as business coaching, training and loans. The mandate of Community Futures is to help diversify rural economies through the services they offer.

CFYE is responsible for working with ten individual communities in the Yellowhead East Region; Swan Hills, Fox Creek, Whitecourt, Woodlands County, Mayerthorpe, Lac Ste. Anne County, Barrhead, County of Barrhead, Onoway and Alberta Beach.

CFYE has recently been awarded the Community and Regional Economic Support Program Grant (CARES) and as the managing partner of the grant, is hereby seeking proposals for the preparation of a Regional Business Diversification Strategy .

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#### **B. Project Objective**

The purpose of the project is to develop strategies and action plans to diversify, retain and support expansion and success of Yellowhead East Businesses for implementation by CFYE, municipal partners and others as may be appropriate.

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#### **C. Project Concept/Overview**

There will a strong focus on building local business growth capacity and financial success by identifying where support can be provided to help businesses to diversify through:

- diversification of client base;
- diversification of products/services;
- diversification of client sector/industries served;

- diversity of business operating locations;
    - diversity of client geographic locations served.
  - Identification of business expansion, growth, closure/contraction, or relocation plans;
  - Identification of any local barriers or challenges to business success (finding suitable labour force, etc.);
  - Identification of geographic/municipal specific actions to be taken by local municipalities or appropriate partner(s);
  - Common or broad-based challenges and opportunities may be best addressed by CFYE or others.
  - CFYE will spearhead the collaborative effort required to engage the municipal (and other) partners.
  - A consultant will be engaged to undertake most of the project, with some assistance from CFYE as noted below.
  - CFYE will also contribute to the data collection through business interviews to be undertaken that will be in addition to those undertaken by the consultant.
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#### **D. Project Details:**

- Regional demographic analysis, labour force analysis, and economic base analysis will be prepared by the consultant to provide a solid understanding of the CFYE economy and to provide a context for the resulting action plans;
- The consultant will prepare the interview questions for review and comment by all 10 CFYE Community CAO's or Economic Development Departments where applicable. (Swan Hills, Fox Creek, Town of Whitecourt, Woodlands County, Town of Barrhead, County of Barrhead, Mayerthorpe, Lac Ste. Anne County, Alberta Beach, Onoway). The consultant will finalize the list of questions to be used across all municipalities.
- The consultant will prepare media/other communications for CFYE municipal partners, and Chambers to utilize to raise awareness of the upcoming project, and how to participate;
- Each municipal partner shall provide a contact list of 20-25 businesses across a variety of industries for potential interviews very early in the project. Each municipal partner shall provide an email introduction to the interviewers at the appropriate time;
- A Business Retention, Diversification & Expansion survey will be undertaken as follows in each of ten municipal jurisdictions:
  - The consultant will complete 10 in-person (or by telephone at the business owner's choice) business interviews;
  - In some communities, a business focus group could be used in lieu of some interviews to increase the number of business owners engaged directly with the consultant;
  - The CFYE staff will conduct 3-5 additional in-person/ telephone interviews (municipal staff invited to participate);
  - Interviews will be supplemented with an online business survey, making participation available to all businesses;

- Prepare a report of findings for each municipal partner that will identify at minimum:
    - Diversification opportunities and whether or not they need support;
    - Challenges and issues to be addressed;
    - Opportunities for expansion or business growth requiring support;
    - Any general economic development related recommendations.
  - The consultant will also conduct up to 3 other stakeholder interviews in the CFYE area, for stakeholders such as Growth, MEDT, Ministry of Labour;
  - The consultant will facilitate a project retreat of project partners to review rolled up/ summary results of survey/interview findings, as well as to prioritize and develop potential solutions to common retention, diversification and expansion challenges and opportunities (common to the CF geography or common to specific industry sectors).
  - The consultant will prepare a brief summary report of CFYE area recommended strategies and actions based upon the input received at the project retreat and the consultant's professional advice.
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#### **E. Selection Process**

1. Solicitation of firms through this "Request for Proposals" through general advertising and invitations.
  2. Review of Proposals by CFYE Manager and Board.
  3. Possible interview of short-listed firms.
  4. Selection and negotiation of contract.
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#### **F. Contents of Proposals**

1. Past experience with similar projects.
  2. Qualifications and experience of principle staff.
  3. Qualifications and experience of proposed affiliated associates for specialized tasks if Required.
  4. Proposed task time table and cost associated with each task including expenses and taxes. Proposed costs involved with the project shall be no more that the full grant amount of \$42,400.00.
  5. Proposed timeline for completion of project to fit within the guidelines of the grant proposal.
  6. References; Proponents are requested to provide references from three similar sized Or type of projects completed within the previous three years.
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## G. Evaluation Criteria

Proposals will be evaluated based on the following criteria and weighting:

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| • Qualifications/Experience of Project Team                              | 20% |
| • Experience on similar past projects and references                     | 20% |
| • Proposed Stakeholder Consultation Process                              | 15% |
| • Proposed timelines to complete the project within scheduled time frame | 20% |
| • Knowledge of the towns within the CFYE Region                          | 15% |
| • Price/Cost   | 10% |
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## H. Reporting Responsibility

CFYE has assigned General Manager, Michelle Jones, to coordinate this project.

Community Futures Yellowhead East  
Michelle Jones, General Manager  
Unit #1, 5023-50 Ave., Box 2185  
Whitecourt, AB T7S 1P8  
[mjones@albertacf.com](mailto:mjones@albertacf.com)

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## I. Project Timeline

The CFYE Regional Business Diversification Strategy must be completed by September 1, 2019. It is expected that the contractor will complete the project in a timely manner.

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## J. Proposal Submissions

Written Proposals must be received at:

Community Futures Yellowhead East  
Michelle Jones, General Manager  
Box 2185, Whitecourt, AB T7S 1P8

Electronic Proposals can be submitted to:  
[mjones@albertacf.com](mailto:mjones@albertacf.com)

Prior to Noon, Friday March 29<sup>th</sup>, 2019

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## **K. Closing Information**

1. CFYE is not liable for any costs or expenses or to reimburse or compensate the Proponents in any manner whatsoever or under any circumstances including, without limitation, in the event of rejection of all proposals or cancellations of the project.
2. CFYE reserves the right to request that any or all proponents clarify and make revisions to their proposal. CFYE is not obligated to seek clarification from any proponent with regard to any aspect of its proposal.
3. CFYE is not bound to accept any proposal. Further, CFYE reserves the right to accept or reject any proposal in whole or in part, waive any irregularities in the proposal process, and to discuss different or additional items to those included in this RFP, at its sole discretion. CFYE may invalidate this RFP and may issue a second RFP at its sole discretion.
4. The access and privacy provisions of the Freedom of Information and Protection of Privacy Act govern all documents and information collected by CFYE relating to this Request for Proposals.

Thank you in advance for your anticipated response.