

REQUEST FOR PROPOSALS (RFP)



Atlantic Trade and Investment Growth Strategy

Delivery of a Pan-Atlantic Export Readiness Program

Grow Export Phase 1

November 2, 2017

1.0 Introduction

On July 4, 2016, the Government of Canada and the four Atlantic Provinces launched the Atlantic Growth Strategy.

With this Strategy, the federal and provincial governments in Atlantic Canada have committed to collaborate on a pan-Atlantic basis on targeted actions to stimulate the region's economy, support both innovative and traditional industries, increase job opportunities for Atlantic Canadians, and focus on persistent and emerging regional challenges.

The Government of Canada and the four Atlantic Provinces are working together to build a vibrant economic future for Atlantic Canada by focusing their efforts and resources to stimulate the region's economy, support the middle class, and address both longstanding and emerging regional challenges.

The Atlantic Growth Strategy's objective is to drive long-term economic growth in the Atlantic region by implementing targeted, evidence-based actions under the following five priority pillars:

- Skilled Workforce/Immigration
- Innovation
- Clean Growth and Climate Change
- Trade and Investment
- Infrastructure

Under the pillar of Trade and Investment, the Atlantic Trade and Investment Growth Strategy (ATIGS) was developed to be a collaborative, pan-Atlantic approach to support the region's long-term economic growth through global competitiveness from trade and foreign investment in the region.

The Strategy was developed jointly by the four Atlantic provincial governments and the Government of Canada with the main objectives to:

- foster an Atlantic export culture;
- ensure Atlantic firms are prepared and have the training and skills to be globally successful;
- create an ecosystem where firms can diversify and expand their presence in international markets; and
- attract foreign investment to Atlantic Canada.

The Atlantic Canada Opportunities Agency, on behalf of ATIGS is seeking proposals from qualified proponents with demonstrated expertise to deliver Phase 1 of the ATIGS-designed Export Readiness program, **Grow Export**, to companies in all four Atlantic Provinces. This program will provide support, tools and resources to interested ready-to-export companies through a customized program from self-assessment to in-market experience.

The qualified proponent will undertake, implement and manage all program elements throughout Prince Edward Island, New Brunswick, Nova Scotia and Newfoundland and Labrador. The responsibilities of the proponent will include the planning, coordination and implementation of all elements of the program: diagnostic assessments, workshop promotion, planning, logistics, facilitation, mentoring, export plan development, measurement, and evaluation. In addition, the proponent will assist in the coordination of familiarization tours to the US border and seaports for all program participants across the Atlantic region.

This project will include the intake of program participants in all 4 Atlantic Provinces (15 per province per intake) and 1 co-hort per each province. The program delivery does not need to run concurrently in each province. The project must commence after the date of contract and to be completed by May 31, 2018. All future Pan Atlantic co-horts will be reassessed and evaluated at the end of this project.

The date of issue for the Request for Proposals is set for Thursday, November 2, 2017, with a closing time of 10:00 a.m., Atlantic Time on Monday, December 4, 2017. The project is to be completed by May 31, 2018.

Proposals must be clearly marked **RFP – Atlantic Trade and Investment Growth Strategy – Delivery of a Pan-Atlantic Readiness Program** and received no later than **10:00 a.m., Atlantic Time on Monday, December 4, 2017.**

Proposals and any further inquiries may be directed to:

Patti Sue Lee
Director, International Business Development
ACOA PEI and Tourism
100 Sydney Street
Charlottetown, PE
C1A 1G3
902-626-2481
Patti-sue.lee@canada.ca

1.1 Situation Overview

Trade and investment are key components of a thriving, more prosperous Atlantic Canada. The Government of Canada and the four Atlantic Provinces are committed to creating the most favourable conditions for businesses to compete internationally and attract foreign investments.

Over the next five years, the federal and provincial governments will also jointly invest \$20 million to provide Atlantic firms with competitive intelligence and market analysis, training and skills development, and in-market engagement activities.

The *Atlantic Trade and Investment Growth Strategy* (ATIGS) aims to double the number of exporters in the Atlantic region by 2025, raise the value of exports by 30%, increase the number of exporters selling to more than one market to 40%, and attract more foreign investment to the region.

ATIGS is an excellent example of how federal and provincial partners are collaborating for the good of Atlantic Canada, its businesses, its communities and its people. This unprecedented level of collaboration will have a positive impact on the region. This multi-year, international business development strategy focuses on expanding business activities between Atlantic Canada and international markets, and on attracting more foreign investments to the region.

Companies that export grow faster, are innovative, and create more and better paying jobs for the middle class. Export is key to growing the Atlantic economy.

1.2 RFP Objectives and Project Scope

Atlantic Trade and Investment Growth Strategy (ATIGS) requires the delivery of a comprehensive Export Readiness Training Program for the benefit of Atlantic Canadian companies. A pilot of the Grow Export program has been created and is currently operating (as a pilot) in one of the Atlantic Provinces.

The objective is to increase both the number of companies engaged in selling goods and services outside of Atlantic Canada, and the total volume/dollar value of exports from the region by fostering new export development, enhancing the capacity of existing exporters, and providing companies with tools they can use to succeed in the global marketplace.

On behalf of ATIGS partners, the Atlantic Canada Opportunities Agency is seeking the proposals of a qualified proponent with demonstrated expertise in training and educational program management, workshop logistics, and program planning and coordination to implement and manage components of the new Grow Export program within all four Atlantic Provinces (PEI, NS, NB & NL).

In delivering the Grow Export program, the proponent will work with an established Pan-Atlantic working group and will provide the leadership and direction it requires to manage all elements of the Grow Export

program in each of the Atlantic Provinces. This work will culminate in the development, delivery and presentation of a final report.

The proponent will provide the leadership, management and coordination required to ensure that the Grow Export program meets the ATIGS intended outcomes.

The scope of work will include:

- Program promotion,
- Assisting in identification, recruitment and selection of companies across Atlantic Canada,
- Acting as primary liaison for all communication among participating companies,
- Participant registration,
- Initiating diagnostic assessments:
 - Work directly with each company to ensure completion of export readiness online diagnostic tool and assess their level of readiness for participation in the program;
 - Existing assessment tools will be utilized.
- Organizing and coordinating all elements of educational session:
 - Forum for International Trade Training (FITT) along with other existing educational courses will be utilized for this program element;
 - Organize all logistics for training delivery including booking facilities, providing food & beverage, selecting and coordinating instructors, administering evaluations, etc.
- Plan and coordinate mentorship aspect of program:
 - Coordinate and develop a list of approved mentors for each province;
 - Coordinate and implement mentoring “Export Café” style mentoring program for each company;
 - The proponent is responsible for the arrangements and costs of each individual session including food, beverage, room rental, etc.;
 - Each participating company will require a mentor session;
- Plan and coordinate familiarization tours to the United States border and ports
 - Logistics, planning and coordination of all meetings (e.g., US Border Services, Port of Halifax, etc.), transportation, communications and itinerary,
 - Conduct participant evaluations
 - The proponent is responsible for all costs associated with the familiarization tours including rentals, logistics, scheduling, fees, etc.
- Assist in the facilitation of companies export plan development with the potential of using existing programs under ATIGS.
 - An export plan will be developed for each participating company and the proponent will be required to recruit and hire consultants as needed.
 - Consultants will be assigned or a choice offered to the participants.
- Reporting:
 - Provide regular updates to ATIGS Working Committee and a final report upon completion of each cohort,
 - Upon completion of program, provide report on each company’s participation, noting any changes or improvements to their level of export readiness and potential next steps,
 - Completed evaluations of FITT courses, familiarization tours, mentorship aspect and export plans,
 - Assist in creating an ongoing evaluation of the program with graduates.
- At the end of each cohort, provide recommendations to the committee on how the program could be improved.

Official languages

- Program elements **may be required** to be delivered and translated in both official languages

Details on the Grow Export Program Phase 1 and Phase 2 are provided in the addendum attached to this RFP.

A program description and the educational workshop program draft materials have been provided for your reference.

1.3 Project Schedule, Contract Period and Primary Work Location

Below is the approximate **schedule** that is expected to be followed for this RFP. However, this may be subject to change and is therefore presented primarily for guidance.

- Preferred work **start** date: **December 22, 2017**
- Preferred work **completion** date: **May 31, 2018**

1.4 Contracting

If the intent of the organization is to use multiple resources to execute this project, please provide a list of firms and/or individuals to be engaged. Work will begin immediately upon signing the contract. The anticipated start date is December 22, 2017 pending final approval and the expected completion date is May 31, 2018.

1.5 RFP Contacts

Questions about this RFP should be directed to the individuals listed below (the "RFP Contacts"), or their designate(s). Information that is obtained from any other source is not official and may be inaccurate.

Patti Sue Lee
Director, International Business Development
ACOA PEI and Tourism
100 Sydney Street
Charlottetown, PE
C1A 1G3
902-626-2481
Patti-sue.lee@canada.ca

2.0 Service Requirements

2.1 Summary

The project requires the services of a qualified proponent to undertake, implement and manage all components of a pilot program on Export Readiness, as developed by ATIGS. Program components are to include: program delivery, coordination, program planning, promotion, and evaluation.

2.2 Detailed Requirements

The successful consultant/vendor will demonstrate that their team has:

- significant knowledge and experience in relation to the proposed work;
- extensive experience in program management, logistics and workshop hosting;
- extensive experience in training and facilitation;
- an understanding of the scope and objectives of the proposal; and
- flexibility to travel throughout the Atlantic region as required.

Provide a proposal outlining how you will meet the scope and objectives of the project including a realistic approach, work plan, schedule and timeline.

Project Team

Names of employees who will be assigned to this project, submit resumes for each and describe their experiences as it relates to their expertise that makes them suitable for this project. Preference may be given to organizations which proposed teams demonstrate relevant work experience to this project.

2.3 Service Delivery Requirements

The requirements in this section will prevail as enduring requirements for service delivery throughout the effective period of any Contract(s) resulting from this RFP.

The proponent will develop a detailed work plan that satisfies the requirements of the Grow Export program for each province and the ATIGS working group.

The plan would, include the various program elements:

- Export Diagnostics Tool
- Educational workshops
- Export Plan development
- Mentoring element
- Fam tours
- Performance measurement

Immediately following award of contract, the proponent will meet in-person with representatives of the ATIGS working group to review the objectives of this assignment and the scope of the project. During this meeting, timelines and milestones will be finalized, as will expected project deliverables.

Final payment upon completion of a final project report of program uptake, satisfaction, program performance and any recommended curriculum/program changes. Details of final report to be confirmed by working group.

Any invoices submitted for services rendered must include a detailed breakdown of the work completed to support the amount that is invoiced. Service Delivery requirements for this RFP are related to Phase 1 only.

2.4 Performance Standards

Services are to be performed under this contract in a manner fully satisfactory to the Atlantic Trade and Investment Growth Strategy partners.

3.0 Eligible Applicants

Applications for project funding will be submitted to the Management Committee for approval.

Eligible applicants include:

- not-for-profit incorporated entities,
- provincial Crown corporations,
- municipal governments,
- not-for-profit organizations owned or controlled by a provincial or municipal government,
- local economic development associations, and
- post-secondary educational institutions.

Commercial entities, federal departments and federal Crown corporations are not eligible applicants.

Commercial entities may partner with eligible applicants for submission.

Sub-Contracting

Utilizing a subcontractor, or contractors, (who must clearly be identified) in the primary bidder's response is acceptable. The eligible proponent must be prepared to take overall responsibility for successful interconnection of the multiple subcontractors and this must be defined in the proposal. The eligible proponent must act as the sole interface between the joint partners and the ATIGS.

4.0 Eligible Costs

Eligible costs mean those reasonable operational business costs linked directly to a project and without which, the project could not proceed. Costs are determined in accordance with generally accepted accounting principles. Capital and operational costs include, without being limited to:

- The cost of a consultant's expertise, their per diem, including costs associated with the hiring of a qualified consultant, his/her services, including sub-contracts, and out-of-pocket expenses such as travel;
- New promotional material, including incremental direct costs for display materials, brochures, online material, web based content, social media tools and/or video;
- Promotion and advertising, including the direct costs for design and placement;
- Temporary meeting space to support trade and investment activities;
- Provision of food and beverage for meals, coffee breaks, and networking events such as receptions;
- Developing and delivering training activities such as information sessions, seminars, conferences, registrations fees, workshops, or webinars, and associated costs such as room, audio visuals, presenters, workbooks, and hospitality;
- Security, logistics and ground transportation;
- Translation and interpretation;
- Memberships, subscriptions and databases;
- Travel expenditures associated with the delivery of a Project (in line with Treasury Board of Canada Travel Directives);
- Direct salaries and benefits for persons specifically employed in planning and/or delivery of a project; and
- Any other reasonable costs.

5.0 Proposal Guidelines

The ATIGS requests that bidders provide their bid in separate documents as follows:

Section I: Management Proposal with no reference to price

(Max. 10 pages excluding appendices)

- 1 hard copy or 1 faxed copy or 1 soft pdf copy by e-mail.

Section II: Financial Bid

- 1 hard copy or 1 faxed copy or 1 soft pdf copy by e-mail.

If there is a discrepancy between the wording of the soft copy and the hard copy, the wording of the hard copy will have priority over the wording of the soft copy.

Prices must appear in the financial bid only. No prices must be indicated in any other section of the bid.

ATIGS requests that bidders follow the format instructions described below in the preparation of their bid:

- use 8.5 x 11 inch (216 mm x 279 mm) paper;
- use a numbering system that corresponds to the bid solicitation.

In April 2006, Canada issued a policy directing federal departments and agencies to take the necessary steps to incorporate environmental considerations into the procurement process [Policy on Green Procurement](http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html) (<http://www.tpsgc-pwgsc.gc.ca/ecologisation-greening/achats-procurement/politique-policy-eng.html>). To assist Canada in reaching its objectives, bidders should:

- 1) use 8.5 x 11 inch (216 mm x 279 mm) paper containing fibre certified as originating from a sustainably-managed forest and containing minimum 30% recycled content; and
- 2) use an environmentally-preferable format including black and white printing instead of color printing, printing double sided/duplex, using staples or clips instead of cerlox, duo tangs or binders.

Section I: Management Proposal

In their management proposal, bidders should demonstrate their understanding of the requirements contained in the RFP and explain how they will meet these requirements. Bidders should demonstrate their capability in a thorough, concise and clear manner for carrying out the work.

The proposal should address clearly and in sufficient depth the points that are subject to the evaluation criteria against which the bid will be evaluated. Simply repeating the statement contained in the bid solicitation is not sufficient. In order to facilitate the evaluation of the bid, ATIGS requests that bidders address and present topics in the order of the Scope of Work. To avoid duplication, bidders may refer to different sections of their bids by identifying the specific paragraph and page number where the subject topic has already been addressed.

Section II: Financial Bid

The total amount of Applicable Taxes must be shown separately.

- 1.1 The total amount of Goods and Services Tax (GST) or Harmonized Sales Tax (HST) is to be shown separately, as applicable.
- 1.2 Bidders must submit their prices FOB destination, as applicable, Canadian customs duties and excise taxes included, as applicable, and GST or HST excluded.
- 1.3 Bidders must provide in their financial bid a price breakdown for the firm price quoted.

6.0 Evaluation Process

(a) Bids will be assessed in accordance with the entire requirement of the bid solicitation including the management and financial evaluation criteria.

(b) An evaluation team composed of representatives of ATIGS will evaluate the bids.

7.0 Success Indicators

- Increase the number of exporters in Atlantic Canada
 - 15 companies per province registered and complete the program
 - These companies are new exporters or early stage exporters
 - The companies should complete all elements of the program
- Enhance the capacity of new exporters in Atlantic Canada
- Providing companies with tools needed to succeed in global marketplace

8.0 Compliance and Completeness Requirements

Proponents **must** address essential and desirable criteria in sufficient detail, depth and clarity to permit a complete analysis and assessment of their project proposal. Incomplete proposals will not be given further consideration for funding.

9.0 Terms and Conditions

The ATIGS reserves the right to:

- Reject any or all proposals received in response to this Request for Proposal;
- Enter into negotiations with any bidder on any or all aspects of the proposal;
- Accept any proposal in whole or in part;
- Cancel and/or re-issue this requirement at any time;
- Pursue or develop any proposed concept in whole or in part with or without the involvement of the proponent

10.0 Official Language Requirements

Proposals may be submitted in either of Canada's official languages, English or French.