

Community Commerce and Calgary Economic
Development: the opportunity for sustainable
leadership

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Responses Due: January 20, 2012

Calgary Economic Development Ltd

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2. Introduction

Calgary Economic Development Ltd (CED) invites qualified firms to submit a proposal for the above titled Request for Proposal (RFP). A proposal, in electronic form, together with one hardcopy must be submitted no later than 16:00 MST, **January 20 2012**. The electronic copy should be sent to the attention of the contracting manager by email as noted in item 14. The hardcopy proposal must be submitted in a sealed package labeled:

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before the closing date with the Vendor's name on the outside of the envelope. Late proposals will not be accepted.

3. Timelines

RFP Release	January 4 2011
Deadline for Questions	Jan 12 2011
Proposal Submission Date	Jan 20 2012
Meetings with Short-Listed Vendors (if required)	week of Jan 23 2012
Bid Notification Date	week of Jan 30 2012
Project Kick Off	Feb 6 2012
Meet with Project Team	week of Feb 6 2012
Completion Date	March 19 2012

4. Definitions

"CED" means Calgary Economic Development Ltd.

"Request for Proposal (RFP)" means this document including attached appendices.

"Contracting Manager" means the person identified in clause 14 of this RFP.

"Vendor" means an organization responding to this RFP.

"Proposal" means a Vendor's response to this RFP and includes all of the Vendor's attachments and presentation materials.

"Services" means the duties, tasks, and responsibilities as described in this RFP.

5. Standard Form Contract

By submitting a Proposal a Vendor acknowledges it agrees that the terms and conditions of this RFP are incorporated by reference into its Proposal. If a Vendor's Proposal is accepted by

CED, the Vendor will be expected to execute CED's standard contractor agreement. Vendors who are unwilling to abide by these standard terms and conditions should not submit a Proposal.

6. Vendors Questions

All questions regarding this RFP must be directed in writing to the Contracting Manager. Enquiries and responses may be recorded and may be distributed to all Vendors.

The Vendor must immediately notify the Contracting Manager in writing of any ambiguity, divergence, error, omission, oversight, or contradiction in this RFP discovered by the Vendor and request whatever clarification is required to prepare the Vendor's Proposal.

In order for CED to deal effectively with Vendor questions or concerns about any terms, conditions or requirements of this RFP, including the standard terms and conditions, such questions or concerns must be communicated in writing to the Contracting Manager in accordance with the Timeline indicated in item (1) above. Questions received after this time will be answered if, in the opinion of CED, time permits.

7. Conflict of Interest

Vendors must fully disclose, in writing, to the Contracting Manager on or before the closing date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest if the Vendor contracted with CED under this RFP. CED may reject any Proposal where, in the opinion of CED, the Vendor is or could be perceived to be in a conflict of interest.

8. Vendor Expenses

The Vendor is responsible for all costs of preparing and presenting its Proposal.

9. Pricing

The budget for this project is \$15,000.00. All Proposals will be issued in Canadian dollars.

10. Background

Calgary Economic Development is the lead economic development agency that markets the Calgary Region's competitive advantages and pro-business climate within Canada and across the world. Through business retention, expansion, and investment attraction activities, and in collaboration with business, community and government, CED plays an integral role in promoting and facilitating sustainable economic growth and prosperity. The organization's efforts are focused on the following four areas:

- Business retention and expansion
- Business investment and attraction
- Workforce Development
- Research, marketing and communications

Currently Calgary Economic Development is trying to identify some strategic opportunities around community economic development approaches that would fit within our current mandate and the 10-year economic development strategy. Community Economic Development is about

strengthening the self-reliance of local and regional economies in order to build resilience. The goal is to have the business community link social, environmental and economic outcomes together to strategically develop Calgary's economy in the community's best interest.

Some initial possibilities in this area include:

- Develop a social innovation fund in Calgary;
- Support entrepreneurs and start-ups with research and marketing services they require to succeed;
- Pursue social finance opportunities, and;
- Support the diversification of Calgary's economy.

Community economic development encourages the use of local resources in a way that enhances economic opportunities while improving social conditions in a sustainable way.

11. Purpose of the Project

Provide Calgary Economic Development management with qualitative and quantitative evidence of existing programming and the appetite for such programming in Calgary. This project will also provide recommendations for future activity to determine a course of action for a potential Community Economic Development Strategy or program at CED.

The main objective of this piece of research is to provide Calgary Economic Development with a detailed business plan on how to move social business, finance and community economic development forward in the City of Calgary.

The emphasis would be to discover and build a business plan rather than to simply research and report back what is happening in other jurisdictions.

The output of the report will be used to assess CED's role, involvement and investment in this activity and programming on a go-forward basis.

12. Objective of the Project

The world is talking about ways to develop and adopt more sustainable ways of doing business, often referring to the Triple Bottom Line benefits (social, economic and environmental). As Calgary's lead Economic Development agency, CED is considering its role and responsibility in supporting, developing and even potentially leading this activity. This project will support and guide the direction for CED and will provide key decision makers on our board, leadership team and City partners to make informed decisions about how to define the extent of our role in Community Economic Development.

The report and business plan should include answers to the following questions:

- What are global (specifically in Europe and North America) best practices regarding activities in community economic development, social business/innovation, entrepreneurship supports (economic gardening), and social finance that could be applied to the Calgary context?
- What are the ongoing activities and leadership in Calgary in this space? (Our research committee can help with this inventory)

- What is the appetite from the business community in Calgary to see leadership and services as it relates to social finance, community economic development and social entrepreneurship? (A recent U of C study has accomplished much of this)
- What are the barriers to success in the terms of consulting, mentorship, financial services, and understanding market demand/educating the marketplace regarding the positives of this approach?
- What are some potential funding sources to support the development of programming and services for the Calgary Region?
- How can Calgary become a leader in the field of social innovation by supporting emerging ways of doing business?
- How, if at all, should Calgary Economic Development play a lead role in coordinating much of the action happening in this area within the City of Calgary? (Are there precedents of other economic development organizations playing a leadership role in this space?)

13. Deliverables

A detailed written report and supporting presentation is to be provided to CED's Program and Senior Management Team to review the findings, research and suggested strategy.

. Elements of deliverables will include, but not be limited to,:

- Demonstrated understanding of the concept of community economic development with a focus on business development and partnership
- Review of existing programs and best practices both locally and globally including any work that other Economic Development Agencies are engaged in
- Assessment of the strategic "fit" of such programming with CED's overall Economic Development Strategy.
- Assessment of the strategic imperative and fit with the City of Calgary's strategies in this space (if any)
- Evaluate the funding options, including but not limited to:
 - Private investment
 - City investment
 - Other government or NFP streams
- Scan of like-programs and a brief description of how they are funded
- Assess the financial and staff resource requirements to develop and sustain such programming (if so recommended)
- Scan of Benefit Corporation ("B Corp") organizations in Canada and particularly Calgary
- Aspirational view of the opportunity

14. Fees and Payment Terms

Proposals should include a breakdown of the Vendor's fees and disbursements in completing the Services.

The Vendor agrees to invoice CED monthly based on progressed completion of the Services as described in this contract. All pre-approved expenses and disbursements are to be invoiced as they are incurred together with the monthly progress billing.

15. Contracting Manager

For the purposes of the provisions of information surrounding this contract or the administration of the contract, the contracting manager is:

Calgary Economic Development Ltd.

Attention: Robyn Bews & Michael Fotheringham

Sustainability Team, Calgary Economic Development

731 1st Street SE
Calgary, Alberta T2G 2G9
Canada

Telephone: (403) 221-7895

Fax: (403) 221-7928

Email: rbews@calgaryeconomicdevelopment.com;
mfotheringham@calgaryeconomicdevelopment.com

16. Proposal Evaluation Criteria

16.1. Selection Methods

When an alternative is proposed regarding any specific requirement, it will be evaluated to ensure that the desired results will be achieved. Vendors should be aware that certain mandatory requirements have been set out in the terms of reference (scope, methodology, and deliverables) and submission information. Proposals that fail to provide these requirements may not be evaluated.

Vendors wishing to participate as Corporate Partners will be given preference provided the vendor adequately meets all requirements.

16.1.1. Vendor Response Guidelines

The following information should be provided in each proposal and may be utilized in evaluating each proposal submitted.

16.1.2. Team Competence & Resources

Describe the capability (technical expertise) of the resources proposed to meet the requirements described in the terms of reference. The proposal shall include a summary of the firm and/or proposed project team knowledge, skills and past experience, with a description indicating how, and in what ways the proposed resources satisfies the needs and objectives identified in the RFP.

Include related experience of the firm, including the past three similar jobs that have completed with the company name, contact person and phone number that CED may contact for a reference.

16.1.3. Methodology

Clearly articulate the process and qualitative and quantitative methodology to be used, proposed work plan schedule, and timeline for deliverables in order to achieve the

objectives and deliverables of the RFP. The methodology should also include consultations and timely reporting to CED.

16.1.4. Fees and Expenses

Expense information should be supplied including a breakdown of costs by major work plan tasks:

- Per diem rates
- Travel, if required
- Administration overhead
- Phone, fax, courier, printing, etc.
- Sundry and contingency overhead rates
- Software costs, data information or research
- Prices must be stated in actual dollars and cents expressed in Canadian funds.
- CED will pay the goods and services tax (GST); however, do not include GST in your proposed pricing.

17. Submission Information

Proposals must be received before 16:00 MST, January 20, 2012 at:

Calgary Economic Development
731 1st Street SE
Calgary, Alberta T2G 2G9
Canada

Attention: Robyn M. Bews and/or Michael Fotheringham

rbews@calgaryeconomicdevelopment.com

mfotheringham@calgaryeconomicdevelopment.com

- Proposals received after the exact time and date noted above will not be considered by CED.
- After the closing, CED may post the identity and addresses of the vendors.
- CED may not consider any proposal that:
 - does not indicate the request for proposals title, closing date, vendors name, on the outside of the envelope containing the hardcopy proposal in response to the RFP; or
 - Is delivered to any address other than that provided above.
 - Proposals must be transmitted by e-mail as noted above. Transmitted proposals will be accepted under the following conditions:
 - The proposal is received before the submission deadline at the e-mail address provided above;
 - The vendor must deliver, during CED business hours, an original hardcopy proposal to the address stated herein immediately following the transmission of the e-mail.

18. CED's Reservation of Rights

CED reserves the right:

- To not consider, or to reject, any or all proposals in whole or in part for any reason whatsoever in its sole and absolute discretion;

- To accept a proposal in whole or in part, even if it does not comply with the terms of this RFP;
- To at any time add, delete or modify this RFP and to have the vendors advise CED of the effect on their proposal of any such changes;
- To negotiate at any time with any of the vendors, including discussing with any vendor the terms of the proposal of any other vendor;
- To discontinue for any reason at any time this RFP process, the evaluation of any or all proposals, or negotiations with vendor;
- To use any concept or approach suggested in a proposal in negotiating a contract with another vendor;
- To not proceed, for any reason, with this RFP or the project contemplated in this RFP;
- To short list vendors, and require a presentation by the vendors short-listed.

19. No Contract or Liability Arising from RFP Process

By submitting a proposal, the vendor acknowledges that:

- no contractual relationship is created between the vendor and CED upon submission of a proposal;
- No contractual relationship is created between the vendor and CED until such time as the vendor and CED have executed a written agreement for the performance of services;
- The vendor does not acquire any legal or equitable rights whatsoever until a written agreement for the performance of services is executed;
- The vendor participates in this RFP process at its sole risk and expense, and CED is not liable to the vendor for any costs, expenses or liabilities incurred by the vendor in any way arising from the vendor's participation;
- CED has made no representations other than those expressly stated in this RFP.
- CED has the right to cancel this request for proposals at any time and to reissue it for any reason whatsoever or decide not to reissue it for any reason, without incurring any liability and no vendor will have any claim against CED as a consequence.
- The proposal and accompanying documentation submitted by the vendors are the property of CED and will not be returned.