

Innovation District Scoping Study

Reference Number: 2207-001

Issued: July 22, 2022

Responses Due: August 17, 2022 at 16:00 MST

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2. Introduction

Calgary Economic Development Ltd. ('CED'), and the Opportunity Calgary Investment Fund ('OCIF') are leading the work undertaken as part of this Request for Proposal (RFP) working with numerous collaborators. Qualified firms are invited to submit a Proposal for the Innovation District Scoping Study RFP. A Proposal, in electronic form, must be submitted as outlined in Section 17. The electronic copy should be sent to the attention of the Contracting Manager by email as noted in Section 15. Late Proposals will not be accepted.

3. Timelines*

RFP release	July 22, 2022
Deadline for questions	August 5, 2022
Proposal submission date	August 17, 2022
Meetings with short-listed Vendors	August 24 – 31, 2022
Bid notification date	September 5, 2022
Anticipated project kick-off	September 12, 2022
Draft report submitted to CED, OCIF and partners	November 11, 2022
Final Report submitted to CED, OCIF and partners	November 25, 2022

*Proposed timelines. Vendors are welcome to propose more efficient timelines to complete the proposed work.

4. Definitions

"City of Calgary" refers to the municipal government of The City of Calgary.

"Contracting Manager" means the person identified in Section 15 of this RFP.

"Innovation" for the purpose of this Scoping Study and future work to build Calgary's Innovation District, Innovation should be considered broadly, linked closely to creativity, and can occur across any discipline and all sectors of an economy. The term Innovation is not limited to startups, entrepreneurs, and technology.

"Innovation Assets" refers to those components critical to the success of an Innovation District. Innovation Assets could include built environment assets (e.g., specific buildings or amenities), infrastructure assets (e.g., connections to built environment assets), or intangible assets (e.g., programs, organizations, relationships, knowledge / expertise). A framework for Innovation Assets will be agreed upon at the initiation of this Scoping Study.

"Innovation District" is commonly defined as a geographic area where leading-edge anchor institutions and companies cluster and connect with start-ups, business incubators, and accelerators. They are physically compact, transit-accessible, and

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technically wired and offer mixed-use housing, office, and retail.¹ Through the Scoping Study, the Vendor is expected to come up with a Calgary-specific definition of an Innovation District.

“Innovation Ecosystem” commonly means interconnected networks of people, Innovation Assets and ideas within an area or region.

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

“Request for Proposal or “RFP” means this document including attached appendices.

“Selection Committee” means the committee that will be reviewing submitted Proposals and selecting the Vendor.

“Services” means the duties, tasks, and responsibilities of the Vendor as described in this RFP.

“Vendor” means an organization responding to 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 CED will use its standard form contract for services as the basis for negotiating a contract with the successful vendor.

6. Vendors Questions

All questions regarding this RFP must be directed via email to the Contracting Manager. Inquiries and responses will be recorded and distributed to all Vendors.

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

Vendor questions or concerns about any terms, conditions or requirements of this RFP must be communicated in writing to the Contracting Manager in accordance with the Timeline indicated in Section 3 above. Questions received after this time will be answered if, in the opinion of CED, the circumstances warrant, and time permits.

7. Conflict of Interest

Vendors must fully disclose, in writing, to the Contracting Manager on or before the Proposal Submission Date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest then known to

¹ Wagner, Katz, and Osha. (2019). The Evolution of Innovation Districts: The New Geography of Global Innovation, The Global Institute on Innovation Districts.

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Vendor between the Vendor and CED, OCIF, the City of Calgary and/or the Selection Committee. CED and/or OCIF may reject any Proposal where, in the opinion of CED and/or OCIF, 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. Confidentiality

All information provided by or obtained from CED or OCIF in any form in connection with this RFP either before or after the issuance of this RFP, including any confidential information

- a) is the sole property of CED and/or OCIF and must be treated as confidential except information that:
 - i. is or becomes generally available to and known by the public, other than as a result of the Vendor's unauthorized disclosure or material breach of this Agreement;
 - ii. was already in the Vendor's possession or available to the Vendor on a non-confidential basis before being provided to the Vendor;
 - iii. becomes available to the Vendor on a non-confidential basis from a source not bound by a confidentiality obligation or agreement with CED; or
 - iv. has been or is independently developed by the Vendor without violating any of the obligations under this Agreement or without use of, or reference to, the Confidential Information;
- b) is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract;
- c) must not be disclosed without prior written authorization from CED/OCIF; and
- d) must be returned by the Vendor to CED/OCIF, or destroyed if held in electronic format, immediately upon the request of CED/OCIF.

10. Background

CED is Calgary's economic development agency with a mandate to position Calgary for long-term economic prosperity through expansion, retention, and attraction of companies, capital, and talent. OCIF, a \$100-million fund was established by the City of Calgary to attract, evaluate, fund, and support transformative projects in the City. The fund offers opportunities for organizations making transformative investments in Calgary that will serve as catalysts to increase the viability of projects that can facilitate economic development in Calgary in the short, medium, and long term.

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Together CED, OCIF, and their collaborators recognize building an Innovation District is an opportunity to create long-term economic prosperity for Calgarians. Calgary is in a moment of reinvention, with strategies and projects underway across the city like the Greater Downtown Plan, Taza, University Innovation Quarter, etc. Currently many of these entities and initiatives are siloed and operating in isolation. Now is the time to bring the community together and rally behind the creation of a city underpinned by Innovation and creativity. We also recognize Innovation is happening in many areas across the city and as such do not want to predetermine a location for one Innovation District. Rather, this Scoping Study should be viewed as a mapping of existing Innovation Assets across Calgary and identification of missing assets and infrastructure that would spur and accelerate Innovation in organically developing clusters.

Since 2016, numerous organizations, including CED, OCIF, Platform Calgary, the City of Calgary, and other collaborators have been working together on the creation of an Innovation District for Calgary. Conversations and speakers and site tours of other jurisdictions' Innovation Districts have described and showcased what a potential Innovation District might mean for Calgary. More recently a formal Discovery Team was formed to catalyze an Innovation District in Calgary. The Discovery Team has since conducted two tranches of engagement in 2021 with community leaders and members to understand the vision, values, potential outcomes and necessary components of a successful Innovation District in Calgary.

Briefly, from the engagements we heard:

- The economic drivers must be a constant interplay between education and industry—a seamless collaboration that reinforces growth and economic prosperity for all.
- We must encourage collisions for “the right people at the right times” through spaces and programming that are accessible and welcoming to all.
- We must create Cultural Vibrancy where people want to live, work, and play in a way that catalyzes our Innovation Ecosystem.
- The built environment² must be modern and inclusive—a magnet for people, business, and investment.

Importantly, three values were identified to guide the development of Calgary's Innovation District: Accessible and inclusive, collaborative and connected, and sustainable. **Appendix B** includes the full What We Heard Reports from both engagement opportunities.

² Defined by the United States Environmental Protection Agency as the man-made or modified structures that provide space to live, work, and recreate. For this Scoping Study, it is not expected the Vendor will provide designs for the built environment component of the Innovation District.

11. Purpose of the Project

The purpose of the Innovation District Scoping Study is to inform a coordinated effort to design and launch an Innovation District in Calgary. As part of this work there must be a concerted effort to breakdown the siloed nature of Calgary's existing Innovation Assets. CED, OCIF, and their collaborators understand the importance of an Innovation District for catalyzing Calgary's fast-growing and accelerating Innovation and startup ecosystem. Innovation Districts encourage collisions between the private sector, post-secondary institutions, research institutes, laboratories, startups and scaleups, and investors by creating a compact cluster of key Innovation Assets. These districts also often include housing options, access to public transportation, and amenities to create a place to live, work, and play. It should be noted the District could be a connection of multiple innovation nodes or clusters across the city, while recognizing the importance of Calgary's downtown as the city's economic and cultural engine.

Our collective goal for the Innovation District is to create the following opportunities for Calgary, if designed and built right:

- Diversify our economy
- Attract, develop, and retain workforce with skills for current and future needs
- Revitalize our downtown and build a city underpinned by a culture of Innovation and collaboration
- Attract businesses, startups, and investment
- Strengthen Calgary's reputation as a connected, creative, and innovative global city
- Create a complete community with creativity as its foundation
- Increase prosperity for all Calgarians

12. Objectives of the Project

The Innovation District Scoping Study will provide CED, OCIF, and collaborators with:

- Key strategic outcomes and unique definition for Calgary's Innovation District;
- A visual mapping of existing Innovation Assets across Calgary, and if relevant adjacent to Calgary's city limits;
- Recommendations on critical components (i.e., built environment, financial and economic structures, cultural assets, governing body for the district etc.) of a best-in-class Innovation District;
- Identification of gaps in Calgary's Innovation Assets critical for a successful Innovation District;
- Identification / definition of criteria to maximize the potential of recommended Innovation Assets;
- Criteria for prioritization, and recommendations on, investments required for missing Innovation Assets (e.g., financial return on investment, time constraint, etc.);

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- Identification of potential areas and boundaries for the Innovation District, understanding that Innovation may cluster and occur in many areas of the city;
- Qualitative and quantitative description of the economic impact of developing Calgary's Innovation District and potential impacts of not building one; and,
- Description of next steps to build the Innovation District, recognizing the Innovation District may take 10 – 20 years to be fully realized.

Critically, Calgary's Innovation District *must* embed equity, diversity, inclusion, accessibility and Indigenous Peoples into its design and development. The Vendor must bring these considerations and principles into all aspects of the work.

13. Deliverables

CED, OCIF and its partners want to see bold, innovative ideas and concepts for Calgary's Innovation District. The designs must speak to the diversity, spirit, and uniqueness of Calgary and its citizens.

The Vendor will work with CED, OCIF and their collaborators to finalize the scope of the study. That said, the following outputs are expected at the conclusion of the Scoping Study.

SECTION I: Map of Existing Innovation Assets

- Determine potential focuses, 'challenges', or 'outcomes' for Calgary's Innovation District;
- Given the variety of Innovation Assets in Calgary, provide a visual map of existing Innovation Assets in Calgary to help determine options for boundaries/areas for the Innovation District; and,
- Identify and define what could make Calgary's Innovation District unique.

SECTION II: Criteria for Recommended Investments

- Using examples of other jurisdictions, define framework for prioritizing recommended investments for Calgary's Innovation District which may include, but is not limited to:
 - Purpose of asset
 - Types of assets
 - Time boundaries/constraints for investment
 - Return on investment
 - Equity, diversity, inclusion, and accessibility considerations
 - Indigenous perspectives and worldviews
- Identify gaps and missing assets Calgary must build, create, or attract to develop nodes or clusters of Innovation

SECTION III: Roadmap to Build Calgary's Innovation District

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- Provide options and rationale for boundaries/areas for Calgary's Innovation District(s), including strengths/benefits of Calgary's downtown as the nucleus of the Innovation District;
- Provide options and rationale for how Calgary's Innovation District might be managed and funded;
- Quantify the economic impact of Calgary's Innovation District and the impact of not building an Innovation District; and,
- Produce a high-level budget and specific recommendations for investments, including OCIF-eligible investments³, and potential timelines to build, create, or attract required assets for Calgary's Innovation District.

CED, OCIF and their collaborators will entertain other suggested deliverables by Vendors.

In the Proposal response, the Vendor will provide a timeline and detailed schedule of activities and steps (i.e., approach) for the completion of this work.

The Vendor will compile the outputs above in formats suitable for presentation and usage of the data and information when building the Innovation District going forward. The deliverables will be used to inform OCIF's strategy, align groups across the city on the importance of an Innovation District, and provide a focused path forward to developing an Innovation District.

This Scoping Study must build on existing research and engagement including renowned research from the Brookings Institute on [The Rise of Innovation Districts](#), research conducted by RSM Canada for CED in 2021 on the current state of Calgary's Innovation Ecosystem, which included compiling an inventory of Innovation Assets across the city, and a Jurisdictional Assessment of Global Innovation Ecosystems in Tel Aviv, Austin, Helsinki, Montreal, and Toronto-Waterloo, and research done by OCIF to date. **Appendix B** contains links to existing research for the Vendors reference and use.

CED and/or OCIF will provide previous work to the selected Vendor at the initiation of the project.

14. Fees and Payment Terms

CED, OCIF and their collaborators expect Vendors to price the work according to the scope outlined above and as competitively as possible. The maximum budget allocated for the Scoping Study is \$150,000 CAD.

Proposals must provide full pricing disclosure and include a breakdown of the Vendor's fees and disbursements to complete all deliverables listed in Section 13 and

³ While these investments may be eligible for OCIF, all projects and initiatives are subject to OCIF processes.

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achieve the objectives listed in Section 12. Please include the following with the breakdown of costs:

- Cost per deliverable.
- Prices must be stated in Canadian dollars and inclusive of all taxes except for GST, which should be itemized separately.

Please provide options for the project team to contribute to reduce project costs and be prepared to consider which aspects of the Proposal might be optional.

15. Contracting Manager

CED and OCIF are leading this RFP and Scoping Study together. For the purposes of the RFP, CED is acting as the Contracting Manager for the RFP process.

For the purposes of the provision of information surrounding this RFP or the administration of a vendor contract, the Contracting Manager is:

Calgary Economic Development Ltd.

Attention: Kate Koplovich, Senior Manager, Strategy

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Calgary, AB T2G 1A6

Canada

Telephone: 403-221-4593

Email: kkoplovich@calgaryeconomicdevelopment.com

16. Proposal Evaluation Criteria

Vendors should be aware that certain mandatory requirements have been set out in the Evaluation Form (scope, methodology, experience, and deliverables). Proposals that fail to provide these requirements may not be evaluated. See **Appendix A** for the Proposal Evaluation Criteria.

17. Submission Information

Proposals must be received **by email on or before August 17, 2022 at 16:00 MST** to:

Email: kkoplovich@calgaryeconomicdevelopment.com

- After the Proposal Submission Date, CED may post the identity and addresses of the Vendors.
- CED may not consider any Proposal that:
 - is received after the exact time and date noted above;
 - does not indicate the Request for Proposal's title, closing date, and Vendor's name on the Proposal in response to the RFP; or
 - is delivered to an address other than that provided above;
- Transmitted Proposals will be accepted if the Proposal is received before the submission deadline to the email address provided above.

18. CED 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 any Proposal in whole or in part, even if it does not comply with the terms of this RFP or is not the highest rated Proposal in accordance with the evaluation criteria;
- To short list Vendors, and require a presentation by the Vendors short-listed and/or the provision of additional information by such short-listed Vendors;
- To, at any time, add, delete or modify this RFP and to have the Vendors advise CED of the effect of such changes on their Proposal and/or have the Vendors resubmit their Proposals in light of same;
- To negotiate at any time with any one or more of the Vendors to the exclusion of the other Vendors; and
- To not proceed, for any reason, with this RFP or the project contemplated in this RFP.

19. Intellectual Property

Unless otherwise agreed and confirmed in writing:

- All material, including but not limited to programs, reports, notes, maps, drawings, photographs, data, forms and other records prepared, created, written or recorded ("**IP**") by: (a) the Vendor, or (b) CED or (c) the Vendor and CED jointly, in connection with the Services under any agreement incorporating the terms and conditions of this RFP, a Proposal, or as a deliverable under any agreement arising therefrom (an "**Agreement**"), will be the property of CED; accordingly, the Vendor hereby assigns to CED all rights, title and interest it may have from time to time in such IP, waives its moral right, and all intellectual property rights therein will vest in CED.
- During the term of the relevant Agreement, the Vendor shall have a non-exclusive, non-transferable license to use such IP of CED or IP which is jointly created for the sole purpose of providing and completing the Services. Upon the termination or completion of a specific project or Agreement, the Vendor will promptly return such material to CED whether completed or not. Notwithstanding the preceding sentence, the Vendor may retain for archival purposes a single copy of each item of such material.
- Every invention, discovery or improvement developed by the Vendor in the course of, or in connection with, performing the Services under an Agreement where the invention, discovery or improvement has been initiated or directed or specifically requested by CED, will be the property of CED and, accordingly, the Vendor hereby assigns any intellectual property right to any such invention, discovery or improvement developed to CED. The Vendor will cooperate fully in the establishment and maintenance of all intellectual property rights accruing hereunder to CED and waive its moral rights with respect hereto. This provision will survive the termination of any Agreement

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and to the extent necessary or desirable, the Vendor will take such actions as are reasonably requested by CED after termination of an Agreement with respect to intellectual property rights created during the term of the Agreement.

- The parties acknowledge and confirm that any IP that was developed prior to the relevant Agreement, or that was developed by the Vendor independently from such Agreement with CED, or that was developed at the sole initiative of the Vendor without any prior initiation or direction or request from CED, will be outside the scope of this Section 16.
- If the Vendor needs access to data of CED in order to carry out Services under an Agreement incorporating the terms and conditions of this RFP, CED will grant a non-exclusive, non-assignable license to have access to and to use that data.

20. No Further Contract or Liability Arising from RFP Process

By submitting a Proposal, the Vendor agrees and acknowledges that:

- Nothing in this RFP nor the submission of the Proposal nor the review and consideration of the Proposal by CED nor any communication between the parties in relation to the RFP or the Proposal will operate to obligate either party to enter into any further business relationship with the other party and, in particular, if CED decides to engage the Vendor in connection with any Proposal or the subject matter of the RFP then such engagement may only occur pursuant to a written agreement that has been signed by both parties and, absent such written agreement, CED will have no further liability or obligation to the Vendor in connection with the subject matter of the RFP;
- The Vendor is participating in this RFP process at its sole risk and expense, and CED will not be liable to the Vendor for any costs, expenses or liabilities incurred by the Vendor in any way arising in connection with the Vendor's participation;
- CED has made no representations other than those expressly stated in this RFP;
- CED has the right to cancel this RFP at any time, CED may reissue this or a similar request for Proposal at any time, 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; and
- The Proposal and any accompanying documentation submitted by the Vendor will become the property of CED and will not be returned.

APPENDIX A – EVALUATION CRITERIA

Innovation District Scoping Study: Proposal Evaluation

Criteria	Possible Points Awarded	Mark	Comments
Quality of submission: 1. Clear and concise 2. Quality of writing	10		
Team competence and resources: 1. Experience of the project team, including the following competencies: a. Experience building Innovation clusters and/or understanding of how Innovation Assets work together to form clusters b. Knowledge of and connections to best-in-class Innovation Districts, including financial incentives, governance and management, investments required, key partners, etc. c. Ability to develop criteria/frameworks for prioritizing investments d. Ability to provide visual representation of Innovation Assets e. Ability to conduct options analysis of potential investment pathways f. Ability to conduct economic impact analyses and provide insights from analysis 2. Relevancy of past projects (work from 2 – 3 projects <u>must</u> be provided; references are encouraged but not required) 3. Understanding of economic development and alignment with <i>Calgary in the New Economy</i> strategy and priorities for Calgary	30		
Approach and deliverable content: 1. Alignment to RFP requirements is clear (10) 2. Approach & methodology (10) : a. Creativity/innovativeness of approach	40		

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<ul style="list-style-type: none"> b. Clarity of approach to meet set objectives and outcomes c. Inclusion of equity, diversity, inclusion, accessibility and Indigenous Peoples into approach and deliverables d. Identification and description of stakeholder engagement opportunities and integration of engagement into recommendations e. Visual mapping of Calgary’s existing Innovation Assets f. Develop investment pathways for Calgary’s Innovation District(s) g. Develop governance and funding models/budget to support the Innovation District h. Clearly communicate insights from analysis i. Provide a visual representation of Calgary’s Innovation District(s) <p>3. Deliverable content (10):</p> <ul style="list-style-type: none"> a. Deliverables meet all criteria and requirements set out in the RFP <p>4. Project management, including (10):</p> <ul style="list-style-type: none"> a. Clear and feasible schedules, work plans, and timelines b. Progress reporting (budget and project updates) 			
<p>Fees (ranked separately):</p> <ul style="list-style-type: none"> 1. Fees have been clearly outlined and are competitive 2. Breakdown of fees and disbursements 	20		
Total	100		

APPENDIX B – ADDITIONAL REFERENCE MATERIAL

Discovery Team Engagement Sessions: [What We Heard Reports](#)

[Current State of Calgary's Innovation Ecosystem](#)

[Brookings Institute Innovation Districts](#)

[Brookings Institute Assessing Your Innovation District: A How-To Guide](#)