

# Calgary Economic Development Four-Year Corporate Strategy

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**Issued: November 25, 2021**

**Responses Due: January 4, 2021**

**Calgary Economic Development Ltd.**

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## 2. Introduction

Calgary Economic Development Ltd (CED) invites qualified firms to submit a proposal for the Calgary Economic Development Four-Year Strategy 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	Nov. 25, 2021
Deadline for Questions	Dec. 13, 2021
Proposal Submission Date	Jan. 4, 2022
Meetings with Short-Listed Vendors (if required)	Jan. 12 - 19, 2022
Bid Notification Date	Jan. 25, 2022
Project kick-off	Feb. 1, 2022
Draft Strategy	May 9, 2022
Final Strategy	Jul. 22, 2022

\*Ideal timeline, which is subject to negotiation

## 4. Definitions

"CED" means Calgary Economic Development Ltd.

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

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

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

"Vendor" means an organization responding to this RFP.

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

"Selection Committee" means the group reviewing RFP proposals and overseeing work on this project.

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

## 5. Standard Form Contract

By submitting a Proposal, a Vendor acknowledges that it agrees that the terms and conditions of this RFP are incorporated by reference into its Proposal. If a Vendor's Proposal is accepted 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 via email to the Contracting Manager. Inquiries 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 clause 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 Vendor between the Vendor and CED and/or the Selection Committee. 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. Confidentiality**

All information provided by or obtained from CED in any form in connection with this RFP either before or after the issuance of this RFP, including any confidential information is the sole property of CED and must be treated as confidential; is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract; must not be disclosed without prior written authorization from CED; and must be returned by the Vendor to CED, or destroyed if held in electronic format, immediately upon the request of CED.

## **10. Background**

Calgary Economic Development (CED) is the lead economic development agency that markets Calgary's competitive advantages and pro-business climate across

Canada and around 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 and shared economic growth and prosperity. The organization's efforts are focused on the following four areas:

- Business investment and attraction
- Business retention and expansion (including trade development)
- Research, marketing and communications
- Talent attraction, retention, retraining and reskilling and development

[Calgary in the New Economy](#), Calgary's economic plan, establishes future ambitions to enable and accelerate Calgary's economic growth. The work of CED feeds into and supports the achievement of this economic plan; *Calgary in the New Economy* is not the organization's corporate strategy. CED's corporate strategy must define and guide how the organization fits within the city's economic strategy while achieving its own strategic direction and fulfill its mission and mandate.

In 2021, CED is undertaking an evolution of *Calgary in the New Economy*. This evolution includes identification of global trends and development of potential future scenarios to 'pressure test' the resilience of the economic strategy, and to focus on achievement of outcomes through associated metrics to measure and monitor progress. This work, in particular the identification of trends and development of scenarios, should be an input to the four-year corporate strategy.

## **11. Purpose of the Project**

The purpose of this project is to set the next four-year strategic direction for the organization (Calgary Economic Development) from 2023-2026.

The four-year corporate strategy will be flexible and actionable across all departments within the organization.

## **12. Objectives of the Project**

Through this work CED will:

- Identify new and emerging risks and opportunities to the organization.
- Set the overarching agenda for CED over the next four years.
- Understand the strategic vision, direction, priorities, and objectives, metrics and/or targets, including how to continuously monitor and measure progress.
- Identify specific recommendations for potential initiatives Calgary Economic Development should undertake to achieve the strategic objectives and targets.
- Have decision criteria and a process to make future organizational decisions in alignment with the strategic direction.

## 13. Deliverables

The consultant will work with CED in defining the exact scope of this study. That said, the consultant's approach must:

- Be innovative and future focused, especially with respect to emerging trends, risks, and opportunities, and leverage new and diverse ways of thinking and perspectives.
- Use existing resources to inform the 2023-2026 Corporate Strategy. That said these resources should not limit the thinking for the new Corporate Strategy.
- Consider internal organizational alignment and coordination between business units.
- Include change management strategies to support mindset and behavioural change required to adapt to new strategy.
- Assess CED's current four-year strategy.
- Identify CED's current strengths, weaknesses, opportunities, and risks.
- Ensure the corporate strategy manages and accounts for constraints and trends identified.
- Incorporate external and internal engagement with key stakeholders.
- Answer key strategic questions such as: How does what's happening outside of CED impact its corporate strategy? How can CED lead change in the community? How will CED's work complement or work alongside other strategies in the city?
- Be iterative and provide metrics for evaluation, accounting for different scenarios and unexpected events.
- Account for addressing gaps in capacity to move forward in operationalizing a living strategy.
- Consider communication and roll out of the strategy to internal and external partners and stakeholders.

The following are expected outputs from the work:

- A current state assessment of CED's outgoing strategy.
- A comprehensive four-year corporate strategy to lay the foundation for success going forward.
- A "living structure"
  - Usable framework and decision criteria that will inform and drive culture, ways of working, departmental focus and priorities, and resource allocation.
  - Tools, processes, and resources to operationalize and continuously monitor and measure progress.
- Specific recommendations for potential initiatives to undertake in the achievement of the strategic objectives.
- A communications plan, with ready to use assets, to share the strategy with both internal stakeholders (including the CED Board) as well as external stakeholders (e.g. Calgary City Council).

The four-year corporate strategy is not meant to be a static, prescriptive detailed plan. It is intended to set the organization's direction for the next four years in a way that is accessible and practical to the various departments and audiences within CED. CED also creates annual business plans, which include detailed objectives for each specific year.

CED recognizes that operationalizing the strategy may extend beyond the delivery date of the final strategy and is open to considering proposals that include future operationalization support.

Please note that the consultant is expected to utilize and build on all existing internal research and external commissioned studies by CED. This includes documents developed for the 2021 *Calgary in the New Economy* pressure-testing work which consist of items related to trends, scenarios, and stakeholder engagement materials.

## **Format of Delivery**

Material for this study should be delivered in a format to be confirmed with the consultant as the work is initiated and progresses in 2022. This could include a report and presentation for use by CED staff and for presentation to Calgary City Council. Given that CED is looking for a "living structure", format of deliverables could also include Excel spreadsheets, toolkits, questionnaires, surveys, applications, decision-making tools, etc.

All materials should be delivered to CED in such a way that it could be used immediately for business development purposes and does not require much manipulation or edits by CED staff.

## **14. Fees and Payment Terms**

The total budget that CED has for this work is \$100,000 CAD, with some flexibility if the proposal has presented a compelling outline for additional funds. Proposals should include a breakdown of the Vendor's fees and disbursements in completing the services. Please include the following with breakdown of costs:

- Travel, if required;
- Administrative fees;
- Prices must be stated in Canadian funds and inclusive of all taxes except for GST, which should be itemized separately.

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

## 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:** Kate Koplovich, Senior Manager, Strategy

500 Centre St S 32nd Floor

Calgary, AB T2G 1A6

Canada

Telephone: (403) 473-6352

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 and the proposal evaluation criteria.

## 17. Submission Information

Proposals must be received by email before 16:00 MDT on Tuesday, January 4, 2021 at:

**Attention:** Kate Koplovich, Senior Manager, Strategy

**Email:** KKoplovich@calgaryeconomicdevelopment.com

- After the Proposal Submission Date, CED may post the identity and addresses of the Vendors.
- CED may elect to 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.
  - 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:

- (a) All material, including but not limited to programs, reports, notes, maps, drawings, photographs, data, forms and other records prepared, created, written or recorded by ("**IP**"): (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 material and all intellectual property rights therein will vest in CED.
- (b) 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; and
- (c) 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. This provision will survive the termination of any Agreement 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 intellectual property 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 clause 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 any 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

**Calgary Economic Development Four-Year Corporate Strategy -  
RFP Evaluation**

Criteria	Point	Mark	Comments
<p>Quality of submission:</p> <ol style="list-style-type: none"> <li>1. Clear and concise – easy to follow.</li> <li>2. Quality of communication (writing and all illustrations/diagrams).</li> <li>3. Alignment of RFP requirements is clear.</li> </ol>	10		
<p>Team competence and resources:</p> <ol style="list-style-type: none"> <li>1. Experience of the project team in developing corporate strategy with non-profits.</li> <li>2. Relevancy of past projects (work from 1 – 2 projects must be provided).</li> <li>3. Experience engaging diverse stakeholders (internal and external) using various methodologies as appropriate for the individual or group.</li> <li>4. Understanding of economic development and alignment of the corporate strategy with <i>Calgary in the New Economy</i></li> <li>5. Experience developing, integrating, and interrogating scenarios within strategies.</li> <li>6. Intentional about working with a lens towards equity, diversity, inclusion and reconciliation.</li> </ol>	20		
<p>Approach and Deliverable content:</p> <ol style="list-style-type: none"> <li>1. Process &amp; methodology (<b>36 points</b>) <ol style="list-style-type: none"> <li>a. Creativity/innovativeness of approach.</li> <li>b. Clarity of process and approach to meet set objectives and deliverables.</li> <li>c. Accounts for the intersection of global trends, local trends, and best practices.</li> </ol> </li> </ol>	50		

<ul style="list-style-type: none"> <li>d. Methodology allows for different ways of work across departments within CED.</li> <li>e. Explanation of final outputs and how they will support CED's request for a living strategy.</li> <li>f. Ability to communicate narrative from analysis in an engaging way for different audiences (external and internal).</li> <li>g. Understanding scope of work and providing extension of that scope (next steps) if applicable.</li> </ul> <p>Identifies and outlines stakeholder engagement priorities. (In general, what stakeholders need to be involved and when?)</p> <ul style="list-style-type: none"> <li>2. Schedules, work plans &amp; timelines meet all criteria and requirements set out in RFP. <b>(7 points)</b></li> <li>3. Progress reporting (budget and project updates). <b>(7 points)</b></li> </ul>				
<p>Fees (ranked separately):</p> <ul style="list-style-type: none"> <li>1. Fees have been clearly outlined and do not exceed the stated budget in the RFP.</li> <li>2. Fee options that go beyond the initial scope of the RFP, if included, are relevant to the extension of the work outlined.</li> <li>3. Breakdown of fees and disbursements.</li> </ul>		20		
<b>Total</b>		100		