

# REQUEST FOR PROPOSAL



# 2027–2030 CORPORATE STRATEGY

Reference Number: 2501-001

Issued: January 30, 2025

Responses Due: February 21, 2025

**Calgary Economic Development Ltd**  
Suite 2600, 237, 4th Ave. SW  
Calgary, Alberta, T2P 4K3  
Phone: (403) 221-7831 or 1-888-222-5855

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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, must be submitted no later than **16:00 MST, February 24, 2025**. The electronic copy should be sent to the attention of the Contracting Manager by email as noted in item 15. Late proposals will not be accepted.

## 3. Timelines\*

RFP Release	January 30, 2025
Deadline for Questions	February 10, 2025
<b>Proposal Submission Date</b>	<b>February 21, 2025</b>
Meetings with Short-Listed Vendors (if required)	Week of February 24, 2025
RFP Award Notification	Week of March 3, 2025
Anticipated Project Kick Off	March 5, 2025
First draft of deliverables	May 5, 2025
Second draft of deliverables	May 16, 2025
Final delivery of deliverables	May 23, 2025

\*Proposed timelines. CED reserves the right to expedite the above timelines related to vendor selection. Vendors are welcome to propose more efficient timelines to complete the proposed work.

## 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 15 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

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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 will be recorded and will be distributed to all vendors who submitted enquiries.

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

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 set out in its 2023 – 2026 Corporate Strategy, focused on the following four areas:

- Prosperity: Local business retention and expansion, foreign business investment and attraction and trade and global expansion.
- Promotion: Marketing and communications, brand and reputation.
- Partnerships: Building mutually beneficial, trusted relationships with civic, community, business and government.
- People: Develop, retain and attract talent to ensure Calgary's workforce is ready for current and future needs.

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Uplook, the city's economic action plan, establishes future ambitions to enable and accelerate Calgary's long-term economic growth. The work of CED feeds into and supports the achievement of this economic plan. Uplook is not the organization's corporate strategy. CED's corporate strategy must define and guide how the organization fits within the city's economic action plan while achieving its own strategic direction and fulfill its mission and mandate.

## 11. Purpose of the Project

The purpose of this project is to support CED set its next four-year strategic direction for 2027 – 2030. CED has a 2023 – 2026 Corporate Strategy which it intends to build upon for its next four-year corporate strategy.

The 2027 – 2030 Corporate Strategy for the organization will incorporate and manage external global, national and local trends to ensure the organization is responding to upcoming political, economic, social, technological and regulatory changes.

## 12. Objectives of the Project

At the end of this project, the Vendor will have worked with CED to:

- Identify global, national and local trends for the next 5 – 10 years and the qualitative and quantitative potential impact on:
  - Foreign direct investment (FDI);
  - Trade; and,
  - Capital flows, including venture capital investments in Canada, Alberta and Calgary.
- Identify global trends related to new artificial intelligence (AI), generative AI and other productivity tools and technologies, by CED's key sectors, and the potential impact on FDI, trade and capital flows, including venture capital investments in Alberta and Calgary.
- Validate and stress test CED's existing Corporate Strategy against these trends to identify potential gaps and refinements, including stress testing against CED's key sectors and identifying future sector opportunities.
- Validate CED's positioning as an economic development agency against other economic development agencies across Canada, and against other local organizations.

The global, national and local trends should include but do not have to be limited to political, economic, social, technological and regulatory.

## 13. Deliverables

The selected Vendor will work with CED to define the exact scope of the project. That said, the Vendor must propose an approach that includes:

- Engagement with, and input from, CED's Senior Management Team (SMT), Directors and CED staff; and,
- Use of CED's existing 2023 – 2026 Corporate Strategy. There is no expectation or desire to redo CED's existing 2023 – 2026 Corporate Strategy.

The following deliverables must be produced by the end of the project:

- Description of global, national and local trends for the next 5 – 10 years, and their quantitative and qualitative impact on Canada, Alberta and Calgary's:
  - FDI;

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- Trade; and,
- Capital flows, including venture capital investments.
- Description of global trends related to new artificial intelligence (AI), generative AI and other productivity tools and technologies, by CED's priority sectors, and the qualitative and quantitative impact.
- Recommendations coming out of the stress test / assessment of CED's existing 2023 – 2026 Corporate Strategy, our priority sectors and the strategy's ability to respond to the identified global, national and local trends.
- Recommendations on potential future sector opportunities based on identified global, national and local trends.
- Assessment of CED's programs and services compared to other economic development agencies across Canada.
- Assessment of CED's programs and services compared to local organizations.

The final deliverables will be presented through:

- A presentation document (PPT) including all above described deliverables, highlighting key findings and recommendations, including an executive summary section.
- An editable document describing the identified global, national and local trends and their quantitative and qualitative impact on FDI, trade and capital flows in Canada, Alberta and Calgary.
- A presentation to CED's SMT and Directors groups.

There is also the potential to present to CED's Board during a one-day Strategic Retreat held in June 2025.

Please note that the consultant is expected to utilize and build on existing documentation and work conducted by CED. For instance, CED has an existing list of other economic development agencies across Canada we use to benchmark.

## 14. Fees and Payment Terms

CED expects Vendors to price this work as competitively as possible. Proposals should include a breakdown of the Vendor's fees and disbursements by deliverable.

The Vendor agrees to invoice CED based on progressed completion of the Services as described:

- 30% upon contract execution
- 20% upon first draft of deliverables
- 20% upon second draft of deliverables
- 30% upon completion

All pre-approved expenses and disbursements are to be invoiced as they are incurred together with the monthly progress billing.

## 15. Contracting Manager and Project Lead

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

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Calgary Economic Development Ltd.  
Attention: Kate Koplovich, Director, Strategy  
Suite 2600, 237 4th Avenue S.W.

Calgary, Alberta, T2P 4K3

Telephone: (403) 221-4593

Email: [kkoplovich@calgaryeconomicdevelopment.com](mailto:kkoplovich@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 Request for Proposal (objectives and deliverables) and submission information. Proposals that fail to provide these requirements may not be evaluated.

#### 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 satisfy the needs and objectives identified in the RFP.

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

#### 16.1.3. Methodology

Clearly articulate the approach to be used, proposed work plan schedule, and timeline for deliverables to achieve the objectives and deliverables of the RFP. Please also include details on project management and status updates.

#### 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

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- 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.

CED will evaluate submissions based on the following criteria, for a total possible score of 100.

Criteria	Point distribution
<b>Quality of Submission</b> <ul style="list-style-type: none"> <li>• Clear and concise</li> <li>• Quality of writing</li> </ul>	<b>10</b>
<b>Team Competency, Capabilities and Background</b> <ul style="list-style-type: none"> <li>• Relevancy of past projects (please provide examples of relevant past work).</li> <li>• Experience and knowledge of economic development agencies and their scope, mandate and impact; knowledge of Calgary Economic Development is an asset.</li> <li>• Demonstrated knowledge of global, national and local trends related to and impacting economic development.</li> <li>• Demonstrated knowledge of global, national and local trends related to technology including artificial intelligence, quantum computing, etc.</li> </ul>	<b>30</b>
<b>Approach and Proposal</b> <ul style="list-style-type: none"> <li>• Comprehensively responds to the stated purpose and objectives of the project.</li> <li>• Clearly outlines approach to fulfill each stated deliverable, including consultations with relevant groups within CED and timely reporting to the Contracting Manager and Project Lead.</li> <li>• Clearly defined timelines to meet desired deadlines.</li> </ul>	<b>40</b>
<b>Fees</b> <ul style="list-style-type: none"> <li>• Fees have been clearly outlined and are competitive.</li> <li>• Breakdown of fees and disbursements by deliverable.</li> </ul>	<b>20</b>
<b>Total</b>	<b>100</b>



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## 17. Submission Information

Proposals must be received by email before **16:00 MST, February 24, 2025** at:

**Attention:** Kate Koplovich, Director, Strategy

**Email:** [kkoplovich@calgaryeconomicdevelopment.com](mailto:kkoplovich@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:
  - 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 Reservation of Rights and Vendor's License Grant

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;
- 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.

By submitting its Proposal for consideration, the Vendor will thereby be agreeing to all of the following:

- Without the further consent of the Vendor or providing any notice, CED may disclose any and all of the content of Vendor's Proposal to any or all of the other vendors or any third party, including any or all of the creative content contained in Vendor's Proposal;
- The Vendor grants and agrees to grant to CED a non-exclusive, perpetual, fully-paid up, irrevocable license to implement, use, reproduce, modify, display, distribute, transmit, prepare derivative works of and to otherwise fully exploit, without limitation, any and all of the content of Vendor's Proposal including without limitation, all of the creative content, ideas, concepts and approached as well as all copyright therein;
- Such licence shall extend to any other vendor or any other third party that CED may engage to use and implement such content;
- CED shall have no obligation to provide any credit or otherwise attribute to the Vendor or anyone else any such content as may be implemented and/or used by CED;

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- The Vendor represents and warrants to CED that such content is the original work of the Vendor and its use by CED as contemplated in this Section 21 will not infringe on any rights of any third party; and
- All of the rights and licenses granted herein and the exercise of all such rights and licenses by CED and the other vendors and such other third parties, as described herein, are granted and may be exercised: (i) without any obligation to account to the Vendor or to otherwise pay any consideration to the Vendor; and (ii) without having to have accepted or shortlisted Vendor's Proposal.

## 19. 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 will any communication between the parties in relation to the RFP or the Proposal 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 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 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; and
- The Proposal and any accompanying documentation submitted by the Vendor will become the property of CED and will not be returned.