



CITY OF CRANBROOK

Request for Proposals

Cranbrook Foreign Direct Investment Attraction Campaign

RFP NO.: CRA2023-R-009

Issue Date:

Wednesday, May 31, 2023

Closing Time:

**Wednesday, June 21, 2023 by 2:30 PM
Mountain Time (MT)**

Closing Location:

City Hall

**Attention: Melissa Smith, Financial Services Manager
40-10th Ave S, Cranbrook, BC V1C 2M8**

TABLE OF CONTENTS

- 1. Request for Proposals and Submission Instructions.....3 – 6**
- 2. Project Objectives and Deliverables7 - 11**
- 3. Proposal12**
- 4. Evaluation Criteria.....13 - 14**
- 5. Term and Conditions.....14 – 18**
- 6. Summary Form of Proposal.....19**
- 7. Appendix 1 – Sample Professional Services Agreement.....20 - 29**

1. REQUEST FOR PROPOSALS AND SUBMISSION INSTRUCTIONS

1.1 Request for Proposals

The Corporation of the City of Cranbrook, in partnership with ?AQ'AM Community Enterprises (ACE), is seeking proposals from qualified parties to develop a Foreign Direct Investment (FDI) Attraction Campaign.

This RFP includes three components:

1. Strategic Planning and Target Identification
2. Creation of a FDI Attraction Package
3. Lead Generation

Proponents can submit proposals for ANY and ALL of the three components listed above. Each component will be evaluated separately in accordance with Section 4.

1.2 Definitions

Throughout this Request for Proposals, the following definitions apply:

- a) "ACE" means ?AQ'AM Community Enterprises;
- b) "Addenda" means all additional information regarding this RFP including amendments to the RFP;
- c) "BC Bid" means the BC Bid website located at www.bcbid.ca;
- d) "City" means the Corporation of the City of Cranbrook;
- e) "Closing Location" includes the location indicated on the cover page of this RFP or BC Bid, as applicable;
- f) "Closing Time" means the closing time and date for this RFP as set out on the cover page of this RFP;
- g) "Contract" means the written agreement resulting from the RFP executed by the City and the successful proponent;
- h) "Contract Administrator" means the City staff member who has been duly hired by the City of Cranbrook to fulfill the duties of that position or his/her designated representative;
- i) "Contractor" or "Consultant" means the successful proponent selected from this RFP who enters into a contract with the City;
- j) "CRIA" means Canadian Rockies International Airport;
- k) "FDI" means Foreign Direct Investment;
- l) "Must," "mandatory," or "required" means a requirement that must be met in order for a proposal to receive consideration;
- m) "Proponent" means a person or entity with the legal capacity to contract, that submits, or intends to submit, a proposal in response to this RFP
- n) "Proposal" means a written response to the RFP that is submitted by a Proponent;

- o) “Request for Proposals” or “RFP” means the solicitation described in this document, including any attached or referenced appendices, schedules or exhibits and as may be modified in writing from time to time by the City by Addenda;
- p) “Should”, “may” or “weighted” means a requirement having a significant degree of importance to the objectives of the RFP; and

1.3 **Delivery of Proposals**

Proposals **MUST** be in English and **MUST** be submitted using one of the submission methods below:

BC Bid Electronic Submission: Proponents may submit an electronic proposal using BC Bid. Proposals must be submitted in accordance with BC Bid and e-bidding key requirements (found at www.bcbid.ca). Only pre-authorized electronic bidders registered on the BC Bid system can submit an electronic proposal. Use of an e-bidding key is effective as signature.

Hard Copy Submission: Proponents may submit three (3) hard-copies of their proposal as outlined in Section 1.4 (f) of this RFP.

Email and facsimile submissions will not be accepted.

All proposal submissions **MUST** include a completed and signed *Summary Form of Proposal* plus the information required as described in Section 1.5 of this RFP.

Proposals received after the Closing Time will not be accepted.

There will be no public opening for this RFP.

1.4 **Submission of Proposals**

- a) Proposals **MUST** be submitted before the Closing Time to the Closing Location using one of the submission methods set out in Section 1.3 of this RFP. The Proponent is solely responsible for ensuring that, regardless of submission method selected, the City receives a complete proposal, including all attachments or enclosures, before the Closing Time.
- b) For BC Bid electronic submissions, the following applies:
 - i. File uploads are limited to 500 MB per file. There are an unlimited number of attachments.
 - ii. Proponents submitting by electronic submission are solely responsible for ensuring that any attachments are not corrupted. The City may reject proposals that are compressed, cannot be opened or that contain viruses, malware or corrupted attachments.

- iii. The closing time on BC Bid is shown in Pacific Time (PT). The City’s Closing Time in this RFP is in Mountain Time (MT). Proponents must ensure their submission is uploaded and completed prior to the Closing Time.
- c) Only pre-authorized e-bidders registered on BC Bid can submit electronic bids on BC Bid. BC Bid is a subscription service (\$150 per year) and the registration process may take two business days to complete. If using this submission method, Proponents should refer to the BC Bid website or contact the BC Bid Helpdesk at 1-800-663-7867 for more information. An electronic proposal submitted on BC Bid must be submitted using the e-bidding key of an authorized representative of the Proponent. Using the e-bidding key of a subcontractor is not acceptable.
- d) The City strongly encourages Proponents using electronic submissions to submit proposals with sufficient time to complete the upload and transmission of the complete proposal and any attachments before the Closing Time.
- e) The Proponent bears all risk associated with delivering its Proposal by electronic submission, including but not limited to delays in transmission between the Proponent’s computer and BC Bid.
- f) Hard copy submissions **MUST** be received in a sealed envelope at the Closing Location by registered mail, courier, or hand delivery before the Closing Time.

(TO HELP IDENTIFY YOUR SUBMISSION, WE ASK THAT YOU PLEASE CUT OUT THE LABEL BELOW AND AFFIX THIS LABEL TO THE OUTSIDE OF YOUR PROPOSAL SUBMISSION)



 <p>MOUNTAINS OF OPPORTUNITY CRANBROOK</p> <p>City of Cranbrook 40 10th Avenue South Cranbrook, BC V1C 2M8</p>	
<p>Attention: Melissa Smith, Financial Services Manager</p>	
<p>REFERENCE NUMBER: CRA2023-R-009</p> <p>PROJECT NAME: Cranbrook Foreign Direct Investment Campaign</p>	
<p>CLOSING DATE: Wednesday, June 21, 2023</p>	<p>CLOSING TIME: 2:30:00 P.M. MOUNTAIN TIME</p>

1.5 **Proposal Submission Format and Checklist**

The following format and sequence should be followed in order to provide consistency in Proponent response and ensure each proposal receives full and fair consideration. All pages should be consecutively numbered.

- a) Title Page, showing Proponent's name, contact person and title, address and contact information;
- b) Completed *Summary Form of Proposal* (**Mandatory Form - signature required**);
- c) Qualifications and Experience as described in Section 3.1; and
- d) Approach and Methodology as described in Section 3.2 broken down into the three components as outlined in Section 2.4.

1.6 **Contact**

Enquiries related to this RFP, including any requests for information or clarification may only be directed in writing to the following person who will respond if time permits before the Closing Time. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses providing new information will be recorded and posted to BC Bid and on the City website.

Melissa Smith, Financial Services Manager
Phone: (250) 489-0265
Email: msmith@cranbrook.ca

The cut-off for submitting any questions relating to this RFP will be 48 hours before the Closing Time. Questions received after this time may not be answered.

1.7 **Environmental Considerations for Proposal Delivery:**

The City encourages Proponents to consider submitting an electronic proposal. When submitting in hard copy, the City encourages Proponents to consider environmental stewardship, as per the following:

- Hard copy proposals should be double side printed on paper that is post-consumer recycled content or forest stewardship certified;
- Thin proposals should be stapled rather than bound;
- Binding, where required, should be comb-type rather than plastic or wire spiral for ease of separating to shred and recycle; and
- Binders, where required, should be free from adhered labels (for ease of re-use), and/or be made of post-consumer recycled content.

1.8 **Project Budget**

The maximum budget for this project (including all three components) is \$61,500, excluding taxes, which includes all fees and disbursements, and any other items required to complete this project.

2. PROJECT OBJECTIVES AND DELIVERABLES

2.1 Background

The City of Cranbrook, in partnership with ?AQ'AM Community Enterprises (ACE), is inviting proposals from skilled consultants with relevant experience in investment attraction, economic development, marketing, or related fields who can provide expertise in Foreign Direct Investment (FDI) Attraction, strategic planning and lead generation.

This initiative represents a response to the *Truth and Reconciliation Commission of Canada: Calls to Action* report, Call 92: Business and Reconciliation. It will provide an important element in our FDI and attraction efforts and serves to accelerate the development of employment lands in partnership and mutual benefit with ?AQ'AM.

The City of Cranbrook recently completed its community economic development plan which recommended the following goals, all of which align with our FDI Strategy.

1. Establish a partner's protocol and prioritize investment with First Nation relationships;
2. City and regional workforce development strategy;
3. Talent retention and attraction;
4. Build an industrial land strategy;
5. Formalize business retention and expansions programs;
6. Launch investment attraction and international trade campaign; and
7. Research and target priority sector clustering.

2.2 Objective

In 2022, a protocol agreement was signed by the City of Cranbrook and ACE to collaborate on the development of the employment lands adjacent to the Canadian Rockies International Airport (CRIA). The City identified the diversification of the CRIA as a priority for the economic development of our city and region. This is in part a response to the economic collapse of the aviation sector during the Covid-19 pandemic.

The City has a financial responsibility to ensure the maintenance and operation of the regional airport and the development of the adjacent land presents an opportunity for the City and ?AQ'AM to generate additional revenue. By strategically utilizing these lands, we can explore various possibilities for revenue generation and leverage this resource to support our financial goals and contribute to overall economic growth.

The site, referred to as the CRIA Employment Lands, consists of 2 parcels located adjacent to the CRIA, north of the City of Cranbrook. The land is currently undeveloped with no improvements.

Parcel 1 – Lot 79

- Owner: ?AQ'AM
- Land Area: 57.3 acres
- Current Zoning: Industrial/ Resource/ Energy – Light Industrial

Parcel 2

- Owner: City of Cranbrook
- Land Area: 52 acres
- Current Zoning: Aerospace

2.3 **Information Available**

The following documents will be provided as part of this RFP. Please email Darren.Brewer@cranbrook.ca to access these documents.

City of Cranbrook Supporting Documentation

1. 2021 Investment Attraction Strategy
2. 2022 Community Economic Development Strategy 2030
3. 2020 Cranbrook Industrial Lands Value-added Study
4. 2020 Cranbrook Industrial Lands Value-added Assessment Economic Impact
5. 2018 Logistics Hub Feasibility Report & Market Demand
6. 2017 Regional Shipping and Logistics Analysis
7. <https://data.choosecranbrook.ca/resources>

?AQ'AM Supporting Documentation

1. 2017 ka kniŋwi-tiyaŋa Our thinking-?AQ'AM Strategic Plan
2. 2022 ?AQ'AM – Lot 79 Feasibility Study
3. 2017 ?AQ'AM Land Use Plan
4. 2021 Nataniŋ Solar Project description
5. 2020 Nataniŋ 45 year production forecast

All information is provided on an as-is basis, and although the City of Cranbrook and ?AQ'AM have compiled and reviewed the information for general accuracy and correctness, the parties offer no guarantees that the information of any portion thereof is correct and will not retain any liability as a result of its use.

2.4 **Deliverables**

The Cranbrook FDI Attraction Campaign has been broken down into the following three components.

1. Strategic Planning
2. FDI Attraction Package
3. Lead Generation

Proponents may submit proposals for any or all of the individual components. It is recognized that likely a group rather than an individual will be required to tackle the varied components of the plan. Each component will be evaluated separately.

2.4.1 **Component 1: Strategic Planning & Target Identification**

This project aims to leverage strategic planning techniques to enhance investment attraction in foreign markets, with a specific focus on the City of Cranbrook and ?AQ'AM lands. In the realm of international economics, strategic planning plays a pivotal role in identifying and evaluating potential targets for investment. To accomplish this, the successful proponent will conduct an in-depth market research analysis which will provide a solid foundation for identifying targets that offer promising investment opportunities.

Market focus shall include the aerospace, renewable energy/ cleantech, and industrial sectors located in the United States of America, East Asia (Japan and South Korea), and the European Union (United Kingdom).

Once potential targets have been identified, the successful proponent will develop a comprehensive plan for investment attraction. This plan shall incorporate a range of strategies, including the implementation of effective campaigns and outreach programs. These initiatives will be designed to raise awareness about the investment potential of the CRIA Employment Lands and attract potential investors.

To optimize the effectiveness of the investment attraction process, it is crucial to define and refine the investment targets. This involves a careful consideration of the specific characteristics and differentiators of each target, ensuring they align with the investment objectives of the City of Cranbrook and ?AQ'AM. The project shall closely align with the City's *2021 Investment Attraction Strategy* and ?AQ'AM's *2017 ka kni#wi·tiyała Our thinking-?AQ'AM Strategic Plan*.

By adopting a strategic approach that combines market research, targeted planning, and alignment with our investment strategies, economic experts involved in this project shall aim to facilitate successful investment attraction endeavours in the international arena. Ultimately, the project aims to attract valuable investments to the CRIA Employment Lands and stimulate economic growth through effective strategic planning and execution.

2.4.2 Component 2: Foreign Direct Investment (FDI) Attraction Package

The successful proponent shall develop a Foreign Direct Investment (FDI) Attraction Package that is visually appealing, well organized, and easy to navigate. High quality graphics, charts, and infographics should be used to enhance readability and comprehension. The content and tone of the package should be tailored to resonate with the target audience, highlighting the specific benefits and opportunities that align with their investment objectives.

The package shall include the following items:

1. **Cover Page:** A visually appealing cover page with the project's name, logo, and a brief tagline or description
2. **Executive Summary:** A concise overview of the investment opportunity, highlighting the key benefits, potential returns, and the unique selling points of the project.
3. **Introduction and Background:** A background of the project, including its objectives, vision, and mission. Explain the market conditions and the investment climate in the relevant industry or sector.
4. **Market Analysis:** A comprehensive analysis of the market, including market size, growth potential, trends, and competitive landscape. Highlight the project's positioning within the market and its potential for success.
5. **Investment Opportunity:** Details of the investment opportunity, including the project scope, timeline, and financial projections. Present a clear outline of the investment requirements, such as capital needed, funding structure, and potential risks.
6. **Value Proposition:** Clearly articulate the unique value proposition of the project. Explain how it stands out from competitors and offers investors a compelling reason to invest.
7. **Project Team:** Introduce the key members of the project team, including their expertise, qualifications, and relevant experience. Highlight any notable achievements or success stories.

2.4.3 Component 3: Lead Generation

The successful proponent shall implement an effective lead generation strategy for investment attraction, leveraging various channels and platforms to reach the target audience. The comprehensive lead generation strategy should attract a diverse range of potential investors, showcasing its investment opportunities and fostering economic development.

To increase the chance of successful investment attraction in Cranbrook, the lead generation strategy shall maximize its reach by strategic utilization of the following channels and platforms:

1. **Networking:** Identify events, seminars, and conferences in 2024 and 2025 by sector, city, and country.
2. **Prospective Investor Database:** Provide a database of prospective C Level/ Decision Makers including contact information, decision makers, website, industry classification, product or service, and revenue. The successful proponent shall arrange meetings with qualified foreign investors.
3. **Content Marketing:** Distribute valuable and relevant content to attract potential investors. This can include blog posts, whitepapers, case studies, and educational materials highlighting the investment opportunities and benefits of investing in Cranbrook.
4. **Social Media Engagement:** Utilize social media platforms to engage with the target audience, share content, and build relationships. Regularly post updates, news, and success stories related to investment opportunities in Cranbrook and foster engagement by promptly responding to comments and messages.
5. **Email Marketing Campaign:** Develop an email marketing campaign to nurture leads and build relationships with potential investors. This includes sending targeted emails with personalized content, investment insights, and invitations to meet with community representatives from the City and ?AQ?AM.
6. **Strategic Partnerships:** Identify partnerships with organizations, influencers, and industry experts who have strong networks and influence in the investment sector. Make first contact to introduce potential investment opportunities with the goal to collaborate on joint marketing initiatives, co-host events, or participate in speaking engagements to expand reach and credibility.
7. **Continuous Tracking and Analysis:** Regularly monitor and analyze the performance of the lead generation efforts to identify areas of improvement and optimize the strategy accordingly.
8. **Personalization and Customization:** Tailor communication and marketing efforts to individual prospects as much as possible. This includes personalizing emails and messages with relevant information based on previous interactions, preferences, or investment history which will help build stronger connections and increase the likelihood of conversion.
9. **Prequalification of Investors:** Qualify potential investors based on their investment objectives, available capital, and investment history using a pre-screening questionnaire. Prequalification also includes conducting due diligence on potential investors to verify credibility and investment capacity and evaluating the investors' alignment with our objectives and goals.

2.5 **Reporting**

The successful proponent will submit a final report addressing the details of the deliverables as outlined in Section 2.4 on a date, no later than November 30, 2023, that has been mutually agreed upon between the Consultant and the parties.

3. **PROPOSAL**

The proposal should be prepared simply and economically. While additional data may be presented, the following Sections 3.1 – 3.3 **MUST** be included. They represent the criteria against which the Proposal will be evaluated.

3.1 **Qualifications and Experience**

Proponents should provide information regarding their qualifications and experience including the following:

- a) a brief description of the Proponent's organization, size, services provided, areas of expertise, and length of time in operation;
- b) a description of at least two (2) projects completed similar to those required in Section 2.4 of this RFP. Each description should include a brief summary outlining the name and scope of the project, project value, date of completion, project manager, key staff members, and a client reference.

3.2 **Approach and Methodology**

Proponents should provide a general overview of how they intend to undertake the project as outlined in Section 2.4 of this RFP, including a statement of the understanding of the work to be done, a clear work plan identifying timelines and project objectives, including completion dates, and the approach and methodology used for each component of this project that the Proponent is submitting a proposal on.

3.3 **All-Inclusive Maximum Fees for Services**

Proponents **MUST** complete the All-Inclusive Maximum Fees for Services section on the *Summary Form of Proposal* included with this RFP.

Each bid should include all pricing information relative to performing the services as described in this RFP. The total all-inclusive maximum fees for services are to contain all direct and indirect costs including all out-of-pocket expenses.

Proponents may submit bids for any or all of the individual components listed.

4. **EVALUATION CRITERIA**

Evaluation of proposals will be by a committee formed by the City and ?AQ'AM and may include employees and contractors of the City and other appropriate participants.

The City's intent is to enter into a Contract with the Proponent who has met all mandatory criteria and minimum scores (if any) and who has the highest overall ranking.

Proposals will be assessed in accordance with the entire requirement of the RFP, including all Mandatory and Weighted Criteria.

4.1 **Mandatory Criteria**

Proposals not clearly demonstrating that they meet the following Mandatory Criteria will be excluded from further consideration during the evaluation process.

Mandatory Criteria
a) The proposal must be received at the Closing Location before the Closing Time.
b) The proposal must be in English.
c) The proposal must be submitted using one of the submission methods set out in Section 1.3 of this RFP.
d) Hard copy submissions must be received in a sealed envelope.
e) The proposal must include a signed copy of the <i>Summary Form of Proposal</i> .

4.2 **Evaluation Criteria**

Proposals meeting all of the Mandatory Criteria outlined in 4.1 will be further assessed against the following Weighted Criteria.

Weighted Criteria	Weight
Qualifications and Experience (Section 3.1)	35
Approach and Methodology (Section 3.2)	40
Fees for Services (Section 3.3)	25
TOTAL	100

4.3 **Price Evaluation**

Only proposals that meet all mandatory requirements and minimum scores will be evaluated. The lowest overall price will be awarded all the points allocated to price. All other proposals will be evaluated using the following formula:

$$\frac{\text{Lowest Overall Price}}{\text{This Proposal's Overall Price}} \quad X \quad \text{Maximum points available}$$

5. **TERMS AND CONDITIONS**

5.1 **Acceptance of Terms and Conditions**

Submitting a proposal indicates acceptance of all of the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

5.2 **Additional Information**

All Addenda will be posted on the City's website and BC Bid. It is the sole responsibility of the Proponent to check for Addenda. Proponents are strongly encouraged to subscribe to BC Bid's email notification service to receive notices of Addenda.

5.3 **Late Proposals**

Proposals will be marked with their receipt time at the Closing Location. Only complete proposals received and marked before the Closing Time will be considered to have been received on time. Proposals received after the Closing Time will be marked late and not considered or evaluated. In case of a dispute, the proposal receipt time as recorded by the City at the Closing Location will prevail whether accurate or not

5.4 **Proposal Validity**

Proposals will be open for acceptance for at least ninety (90) days after the Closing Time.

5.5 **Firm Pricing**

Prices will be firm for the entire Contract period unless the RFP specifically states otherwise.

5.6 **Completeness of Proposal**

By submitting a proposal the Proponent warrants that, if the RFP is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no additional charge.

5.7 Changes to Proposals

By submitting a clear and detailed written notice, the Proponent may amend or withdraw its proposal before the Closing Time. Unless the RFP otherwise provides, Proponents should use a consistent submission method for submitting proposals and any amendments or withdrawals. Upon Closing Time, all proposals become irrevocable. The Proponent will not change any part of its proposal after the Closing Time unless requested by the City for purposes of clarification.

5.8 Liability for Errors

While the City has used considerable efforts to ensure information in the RFP is accurate, the information contained in the RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the City, nor is it necessarily comprehensive or exhaustive. Nothing in the RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in the RFP.

5.9 Proponents' Expenses

Proponents are solely responsible for their own expenses in participating in the RFP process, including the costs in preparing a proposal and for subsequent finalizations with the City, if any. The City will not be liable to any Proponent for any claims, whether for costs, expenses, damages or losses incurred by the Proponent in preparing its proposal, loss of anticipated profit in connection with any final Contract or any other matter whatsoever.

5.10 No Commitment to Award

The RFP should not be construed as an agreement to purchase goods or services. The lowest priced or any proposal will not necessarily be accepted. The RFP does not commit the City in any way to award a Contract.

5.11 Reservation of Rights

In addition to any other reservation of rights set out in the RFP, the City reserves the right, in its sole discretion:

- a) to modify the terms of the RFP at any time prior to the Closing Time, including the right to cancel the RFP at any time prior to entering into a Contract with a Proponent;
- b) in accordance with the terms of the RFP, to accept the proposal or proposals that it deems most advantageous to itself;
- c) to waive any non-material irregularity, defect or deficiency in a proposal;
- d) to request clarifications from a Proponent with respect to its proposal, including clarifications as to provisions in its proposal that are conditional or that may be inconsistent with the terms and conditions of the RFP, without any obligation to make such a request to all Proponents, and consider such clarifications in evaluating the proposal;

- e) to reject any proposal due to unsatisfactory references or unsatisfactory past performance under contracts with the City, or any material error, omission or misrepresentation in the proposal;
- f) at any time, to reject any or all proposals; and
- g) at any time, to terminate the competition without award and obtain the goods and services described in the RFP by other means or do nothing.

5.12 **Contract**

By submitting a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with the City.

Written notice to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the good or services until the occurrence of both such events.

If a written Contract cannot be finalized with provisions satisfactory to the City within thirty (30) days of notification of the successful Proponent, the City may, at its sole discretion at any time thereafter, terminate discussions with that Proponent and either commence finalization of a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any of the Proponents.

5.13 **No Guarantee of Volume of Work or Exclusivity of Contract**

The City makes no guarantee of the value or volume of work to be assigned to the successful proponent. The agreement to be negotiated with the successful proponent will not be an exclusive contract for the provision of the goods or services described in Section 2 of this RFP. The City may contract with others for goods or services the same as or similar to those described in Section 2 or may obtain such goods or services internally.

5.14 **Solicitation**

Any attempt by Proponents to influence the outcome of the RFP process by engaging in solicitation, either directly or indirectly, of any employee, contractor or representative of the City, including members of the evaluation committee and any elected or appointed officials of the City, or with the media, may result in disqualification of the Proponent.

5.15 **Workers Compensation Act**

The Contractor must provide to the City their Worksafe BC registration number and a Letter of Clearance. The Contractor must ensure compliance on their part with the Workers' Compensation Act and the Occupational Health and Safety Regulations. This will extend to any subcontractors hired by the successful Proponent, who will be on City property.

In any case where pursuant to the provisions of the Workers' Compensation Act, the Workers' Compensation Board orders the Contractor, in respect of their operations under the RFP, to cease operations because of failure to install or adopt safety devices or appliances directed by the order of the said Board, or required under said Act or Regulations thereunder or because said Board is of the opinion the conditions or immediate danger exist that would be likely to result in injury to any person, or because of lack of payment of an account due to the Board, the City, on 24 hours written notice to the Contractor, may terminate the Contract.

5.16 Indemnity and Liability Insurance

For the purpose of any Contract the City may enter into with the successful Proponent, the Contractor must indemnify and hold harmless the City, its employees and agents, from any or all claims, demands, actions, and costs whatsoever that may arise, directly or indirectly out of any act or omission of the Contractor, its employees, or agents, in the performance by the Contractor of this RFP. Such indemnification must survive termination of the Contract.

The Contractor must provide to the City proof of \$2 million General Liability Insurance with the City named as an additional insured party. The City reserves the right to modify the type of insurance coverage and amount coverage (which may include increasing the amount of coverage) required to be carried by the Contractor.

5.17 Compliance with Laws and Permits

The Contractor must apply and pay for all necessary permits or licenses, including City of Cranbrook Business License, required for the execution of the work. The Contractor must give all necessary notices and pay for all fees required by law and comply with all laws, ordinances, rules and regulations relating to the work and to the preservation of the public health. The Contractor must be responsible for the safety of all workmen and equipment on the project in accordance with all applicable safety legislation passed by Federal, Provincial and Local Authorities governing safety.

5.18 Trade Agreements

This RFP has been issued in compliance with the City of Cranbrook Purchasing Policy No. 40-501 and meets the requirements of the Canadian Free Trade Agreement and the New West Partnership Trade Agreement.

5.19 Freedom of Information

Without limiting other obligations under the *Freedom of Information and Protection of Privacy Act* and any other enactments that may apply to the City or the Proponent or to both, and despite any promises or commitment by the City to preserving the confidentiality of information to the extent permitted by law, the Proponent acknowledges that any information provided to the City in relation to this RFP, or that is created, produced, negotiated or otherwise comes within the City's custody or under its control pursuant to this RFP, may be subject to a legal requirement to disclose the information pursuant to a request for access under that Act.

5.20 **Conflict of Interest**

A Proponent may be disqualified if the Proponent's current or past corporate or other interests, or those of a proposed subcontractor, may, in the City's opinion, give rise to an actual, perceived or potential conflict of interest in connection with the services described in the RFP. This includes, but is not limited to, involvement by a Proponent in the preparation of the RFP or a relationship with any employee, contractor or representative of the City involved in preparation of the RFP, participating on the evaluation committee or in the administration of the Contract.

A Proponent must disclose in its proposal any actual or potential conflict of interest and any existing business relationships it may have with the City of Cranbrook, its elected or appointed officials or employees. The City has the right to reject any proposal submitted by a Proponent who in the City's determination, has, or if awarded the Contract would have, an actual, perceived or potential conflict of interest.

If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the City Contact prior to submitting a proposal. By submitting a proposal, the Proponent represents that it is not aware of any circumstances that would give rise to a conflict of interest that is actual or potential, in respect of the RFP.

5.21 **Intellectual Property**

All drawings, plans, models, designs, specifications, maps, images, data, reports and other documents, including both digital and hard copy documents, commissioned by the City of Cranbrook as a result of this RFP, shall remain the property of the City of Cranbrook into perpetuity.

CITY OF CRANBROOK
SUMMARY FORM OF PROPOSAL

RFP NO: CRA2023-R-009

NAME OF PROJECT: Cranbrook Foreign Direct Investment Attraction Campaign

DESCRIPTION

All-Inclusive Maximum Fees for Services (excluding taxes):

Component 1: Strategic Planning & Target Identification	\$
Component 2: FDI Attraction Package	\$
Component 3: Lead Generation	\$

CONFIRMATION OF THE PROPONENT’S INTENT TO BE BOUND:

The enclosed Proposal is submitted in response to the referenced Request for Proposals, including any Addenda. By submitting a Proposal the Proponent agrees to all of the terms and conditions of the RFP including the following:

- a) The Proponent has carefully read and examined the entire Request for Proposals;
- b) The Proponent agrees that they have reviewed and considered all Addenda (if any) and have taken that into account with determining the price(s) proposed above;
- c) The Proponent has conducted such other investigations as were prudent and reasonable in preparing the Proposal; and
- d) The Proponent agrees to be bound by the statements and representations made in its Proposal.

Proponent Name (please print): _____

Name & Title of Authorized Representative (please print): _____

Signature of Authorized Representative: _____

Address: _____

Telephone: _____ **Email:** _____

Executed this _____ **day of** _____, **20** _____

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

FOR
PROFESSIONAL CONSULTING SERVICES

MEMORANDUM OF AGREEMENT dated the _____ day of A. D. 20____

-BETWEEN-

THE CORPORATION OF THE CITY OF CRANBROOK

Hereinafter called the 'Client'

THE PARTY OF THE FIRST PART

-AND-

[SUCCESSFUL PROPONENT]

Hereinafter called the 'Consultant'

THE PARTY OF THE SECOND PART

WHEREAS the Client intends to

hereinafter called the 'Project' and has requested the Consultant to furnish professional services in connection therewith;

NOW THEREFORE WITNESSETH that in consideration of the covenants contained herein, the Client and the Consultant mutually agree as follows:

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

ARTICLE 1 - GENERAL CONDITIONS

1.01 Retainer

The Client hereby retains the services of the Consultant in connection with the Project and the Consultant hereby agrees to provide the services described herein under the general direction and control of the Client.

In this Agreement the word Consultant shall mean professionals and other specialists engaged by the Client directly and whose names are party to this Agreement.

1.02 Services

The services to be provided by the Consultant and by the Client for the Project are set forth in Article 2 and such services as changed, altered or added to under Section 1.08 are hereinafter called the 'Services'.

1.03 Compensation

The Client shall pay the Consultant in accordance with the provisions set forth in Article 3. For purposes of this agreement, the basis of payment shall be as specified in Article 3.X.X.

1.04 Staff and Methods

The Consultant shall perform the services under this agreement with that degree of care, skill and diligence normally provided in the performance of such services as contemplated by the agreement at the time such services are rendered and as required by the _____ (for example - *Engineers' and Geosciences Act*). The Consultant shall employ only competent staff who will be under the supervision of a senior member of the Consultant's staff.

1.05 Drawings and Documents

Subject to Section 3.2.4 of Article 3, drawings and documents or copies thereof required for the Project shall be exchanged between the parties on a reciprocal basis. Documents prepared by the Consultant for the Client, including record drawings, may be used by the Client, for the Project herein described. In accordance with Article 1.06, the Client indemnifies the Consultant for unauthorized use of the documents and deliverables.

1.06 Intellectual Property

All concepts, plans, drawings, specifications, designs, models, reports, photographs, computer software, surveys, calculations, construction and other data, documents, and processes produced by the Consultant in connection with the Project (the "Instruments of Service"), including all copyright and other intellectual property therein, are and shall at all times remain the property of the Consultant unless otherwise agreed in writing between the parties.

The Client shall have permanent exclusive royalty-free license to use any concept, product or process, which is patentable, capable of trademark or otherwise produced by or resulting from the Services rendered by the Consultant in connection with the Project and for no other purpose or project.

1.07 Records and Audit

- (a) In order to provide data for the calculation of fees on a time basis, the Consultant shall keep a detailed record of the hours worked by staff employed for the Project.
- (b) The Client may inspect timesheets and record of expenses and disbursements of the Consultant during regular office hours with respect to any item which the Client is required to pay on a time scale or disbursement basis as a result of this Agreement.
- (c) The Consultant, when requested by the Client, shall provide copies of receipts with respect to any disbursement for which the Consultant claims payment under this Agreement.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

1.08 Changes and Alterations and Additional Services

With the consent of the Consultant the Client may in writing at any time after the execution of the Agreement or the commencement of the Services delete, extend, increase, vary or otherwise alter the Services forming the subject of the Agreement, and if such action by the Client necessitates additional staff or services, the Consultant shall be paid in accordance with Section 3.2.1 for such additional staff employed directly thereon, together with such expenses and disbursements as allowed under Section 3.2.4. In the event that the client delays the project then the consultant shall have the right to renegotiate the agreement.

1.09 Suspension or Termination

Either Party may at any time by notice in writing to the other party, suspend or terminate the Services or any portion thereof at any stage of the project. Upon receipt of such written notice, the Consultant shall perform no further Services other than those reasonably necessary to close out his Services. In such an event, the Consultant shall be entitled to payment in accordance with Section 3.2. for any of the Consultant's staff employed directly thereon together with such expenses and disbursements allowed under Section 3.2.

If the Consultant is practicing as an individual and dies before his Services have been completed, this Agreement shall terminate as of the date of his death, and the Client shall pay for the Services rendered and disbursements incurred by the Consultant to the date of such termination.

1.10 Indemnification

The Consultant shall indemnify and save harmless the Client from and against all claims, actions, losses, expenses, costs or damages of every nature and kind whatsoever which the Client, his employees, officers or agents may suffer, to the extent the Consultant is legally liable as a result of the negligent acts of the Consultant, his employees, officers or agents in the performance of this Agreement.

The Client agrees to hold harmless, indemnify and defend the Consultant from and against any and all claim, losses, damages, liability and costs of defense arising out of or in any way connected with the presence, discharge, release or escape of contaminants of any kind, excluding only such liability as may arise out of the negligent acts of the Consultant in the performance of consulting services to the Client within this project.

1.11 Insurance

The Client will accept the insurance coverage amount specified in this clause section (a) as the limit of liability of the Consultant and its employees for the Client's damages.

a) Commercial General Liability and Automobile Insurance

The Insurance Coverage shall be no less than \$2,000,000 per occurrence and in the aggregate for General Liability and \$2,000,000 per occurrence and in the aggregate for products and completed operations with respect to Commercial General Liability and no less than \$2,000,000 per occurrence for Automobile Insurance. Prior to commencement of the project, the Consultant shall provide the Client with proof of Comprehensive General Liability and when requested, Automobile Insurance (Inclusive Limits) for both owned and non-owned vehicles.

b) Professional Liability Insurance

The Insurance Coverage shall be in the amount of \$2,000,000 per claim and in the aggregate. Prior to commencement of the Project, the Consultant shall provide to the Client proof of Professional Liability Insurance carried by the Consultant.

c) Change in Coverage

If the Client requests to have the amount of coverage increased or to obtain other special insurance for this Project then the Consultant shall endeavour forthwith to obtain such increased or special insurance at the Client's expense as a disbursement allowed under Section 3.2.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

It is understood and agreed that the coverage provided by these policies will not be changed or amended in any way nor cancelled by the Consultant until thirty (30) days after written notice of such change or cancellations has been personally delivered to the Client.

1.12 Contracting for Construction

Neither the Consultant nor any person, firm or corporation associated or affiliated with or subsidiary to the Consultant shall tender for the construction of the Project, or have an interest either directly or indirectly in the construction of the Project.

1.13 Assignment

Neither party may assign this Agreement without the prior consent in writing of the other.

1.14 Previous Agreements

This Agreement supersedes all previous agreements, arrangements or understandings between the parties whether written or oral in connection with or incidental to the Project.

1.15 Approval by Other Authorities

Unless otherwise provided in this Agreement, where the work of the Consultant is subject to the approval or review of an authority, department of government, or agency other than the Client, such applications for approval or review shall be the responsibility of the Consultant, but shall be submitted through the offices of the Client and unless authorized by the Client in writing, such applications for approval or review shall not be obtained by direct contact by the Consultant with such other authority, department of government or agency.

1.16 Principals and Executives

The use of Principals and Executives on a time basis by the Consultant, will be in accordance with Section 1.23.1 (c).

1.17 Sub-Consultants

The Consultant may engage others as sub-consultants for specialized services provided that prior approval is obtained, in writing, from the Client and may add a mark-up of not more than 5% of the cost of such services to cover office administration costs when claiming reimbursement from the Client plus the cost of the additional insurance incurred by the Consultant for the specialized services.

1.18 Inspection

The client, or persons authorized by the Client, shall have the right, at all reasonable times, to inspect or otherwise review the Services performed, or being performed, under the Project and the premises where they are being performed.

1.19 Publication

The Consultant agrees to obtain the consent in writing of the Client before publishing or issuing any information regarding the Project.

1.20 Confidential Data

The Consultant shall not divulge any specific information identified as confidential, communicated to or acquired by him, or disclosed by the client in the course of carrying out the Services provided for herein. These obligations of confidentiality shall not apply to information which is in the public domain, which is provided to the Consultant by a third party without obligation of confidentiality which is independently developed by the Consultant without access to the Client's information, or which is required to be disclosed by law or by court order. No such information shall be used by the Consultant on any other project without the approval in writing of the client.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

1.21 Dispute Resolution

- (a) If requested in writing by either the Client or the Consultant, the Client and the Consultant shall attempt to resolve any dispute between them arising out of or in connection with this Agreement by entering into structured non-binding negotiations with the assistance of a mediator on a without prejudice basis. The mediator shall be appointed by agreement of the parties. If a dispute cannot be settled within a period of ninety (90) calendar days with the mediator, the dispute shall be referred to and finally resolved by arbitration under the rules of the province having jurisdiction or by an arbitrator appointed by the agreement of the parties.
- (b) No person shall be appointed to act as mediator or arbitrator who is in any way interested, financially or otherwise, in the conduct of the work on the Project or in the business or other affairs of either the Client or the Consultant.
- (c) The provisions of Commercial Arbitration Act, R.S.B.C. 1996. c. 55.as amended shall apply.

1.22 Time

The Consultant shall perform the Services expeditiously to meet the requirements of the Client and shall complete any portion or portions of the Services in such order as the Client may require. .

The Client shall give due consideration to all designs, drawings, plans, specifications, reports, tenders, proposals and other information submitted by the Consultant, and shall make any decisions which he is required to make in connection therewith within a reasonable time so as not to delay the work of the Consultant.

1.23 Estimates, Schedules and Staff List

1.23.1 Preparation of Estimate of Fees, Schedule of Progress and Staff List

When requested by the Client, and where payment is calculated on a time basis, the Consultant shall provide, for approval by the Client:

- (a) An estimate of the total fees to be paid for the Services.
- (b) A Schedule showing an estimate of the portion of the Services to be completed in each month and an estimate of the portion of the fee which will be payable for each such month.
- (c) A Staff list showing the number, classifications and hourly rate ranges for staff, Principals and Executives, for which the Consultant will seek payment on a time basis. The Consultant shall relate such information to the particular type of work that such staff is to perform, while employed on the Project. Such list shall designate the member of the Consultant's staff who is to be the liaison person between the Consultant and the Client.

1.23.2 Subsequent Changes in the Estimate of Fees, Schedule of Progress and Staff List

The Consultant will require prior written approval, from the Client for any of the following changes:

- (a) Any increase in the estimated fees beyond those approved under Subsection 1.23.1 (a).
- (b) Any change in the schedule at progress which results in a longer period than provided in Subsection 1.23.1 (b).
- (c) Any change in the number, classification and hourly rate ranges of the staff provided under Subsection 1.23.1 (c).

1.23.3 Monthly Reporting of Progress

When requested by the Client, the Consultant shall provide the Client with a written report showing the portion of the Services completed in the preceding month.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

1.24 **Additional Conditions**

ARTICLE 2 - SERVICES

2.01 Services to be provided by Consultant

2.02 Services to be provided by Client

ARTICLE 3 - FEES AND DISBURSEMENTS

3.1 Definitions

For the purpose of this Agreement, the following definitions shall apply:

(a) **Cost of the Work:**

- (i) The “Cost of the Work” shall mean the total cost of the Project including all materials, equipment, sales taxes, labour and contractor’s overhead and profit, necessary to complete the work for which the Consultant prepares designs, drawings or specifications, for which he is responsible. Where sales taxes are not included in the cost of the work, the fee shall be adjusted upwards by the factor equivalent to the sales taxes. The adjusted fee may be computed to the nearest one-tenth of one percent (1/10%).
- (ii) Wherever the Client furnishes labour or other service which is incorporated in the work, the current price of labour or other service when the work was executed shall be used to compute the Cost of the Work.
- (iii) Whenever used materials or equipment is furnished by or on behalf of the Client, the fair market value of such materials or equipment, as though it was purchased new, shall be used to compute the Cost of the Work.
- (iv) The Cost of the Work shall not include any fees and disbursements due to the Consultant, the Client’s engineering and office expenses, or cost of land.

(b) **Site:**

Site includes the actual work site and other locations where the checking of materials, equipment and workmanship is carried out.

3.2 Basis of Payment (STRIKE OUT INAPPLICABLE PARAGRAPHS)

3.2.1 Fees Calculated on a Percentage of Cost Basis

The Client shall pay the Consultant fees to be calculated as a percentage of the Cost of the Work for normal projects as follows:

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

CALCULATION OF FEE

TYPE OF SERVICE	PERCENTAGE
_____	_____
_____	_____
_____	_____

3.2.2 Fees Calculated on a Time Basis

The Client shall pay the Consultant a fee, calculated on a time basis, for that part of the Services described in Article 2. Fees on a time basis for all staff shall be hourly rates based on job classifications as follows:

Classification: Hourly Rate:

For a project of over one (1) year duration, or for projects which become extended beyond one (1) year in duration, the consultant may from time to time seek approval from the client to adjust hourly rates and such approval shall not be unreasonably withheld.

3.2.2.2 Time Expended

All time expended on the assignment, whether in the Consultant's office, at the Client's premises, or elsewhere, and including travel time, shall be chargeable. This also includes, but is not limited to, stenographic and clerical staff engaged in the preparation of documents such as reports and specifications.

3.2.3 Lump-Sum Fee / Negotiated Fee

3.2.3.1 Lump-Sum Fee Basis

- (a) Fees for the scope of work covered under this Agreement will be on a Lump-Sum Fee Basis, inclusive for labour and reimbursable expenses.
- (b) Monthly progress invoices will be based on the percentage of project completed or milestone achieved. Invoices for fees are due upon presentation. Accounts unpaid after 30 days are subject to monthly interest charges at a rate of ___% per annum. The Consultant reserves the right, without penalty, to discontinue services in the event of non-payment.
- (c) If the project is abandoned or delayed for any reason beyond the Consultant's control, the Client shall pay a fee for services rendered to that date, plus the termination expenses reasonably incurred by the Consultant in winding down the project.
- (d) GST will be added to the Lump-Sum Fee.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

3.2.4 Reimbursable Expenses

In addition to the fee, the Consultant shall be reimbursed at cost plus an administrative charge of 5%, plus the cost of additional insurance incurred by the Consultant, for all expenses properly incurred by him in connection with the project, including but not limited to: vehicle use charges, travelling and living expenses, long distance telephone charges, facsimile transmission charges, printing and reproductions, progress photography, advertising for tenders, special delivery and express charges, overtime premium costs, and the cost of providing and maintaining site offices, supplies and equipment, chemical and physical tests.

3.2.4.1 Information Technology and Reprographic (ITR) costs incurred by the Consultant shall be reimbursed at a standard charge rate of \$____ per labour hour expended. The assessment shall include all information technology resources required for purposes of providing the services contemplated under this agreement, including: computer equipment/systems, computer software, computer supplies, networking (local and wide area), and labour associated with computer management, administration and support. Computer systems include all types of computers, such as: general purpose microcomputers, PC-CADD microcomputers, graphic design workstations, and notebooks. The ITR charge shall also include all regular in-house convenience copying and printing. Cost for reproducing specifications and drawing set shall not be included in this rate.

3.2.4.2 Telecommunication costs (COM) other than video-conferencing incurred by the Consultant shall be reimbursed at a standard charge rate of \$____ per labour hour expended. The assessment shall include in-house costs for use of telephone/telecommunication services (including maintenance and support) and facsimile transmissions.

3.3 Payment

3.3.1 Fees Calculated on a Time Basis

The Consultant shall submit an invoice to the Client for all Services completed in the immediately preceding month. Interest at the annual rate of ____ percent (____ percent monthly) will be paid on the total outstanding unpaid balance commencing 30 days after the Client has received the Consultant's invoice.

3.3.2 Fees Calculated on a Percentage of Cost Basis

(a) Monthly Payment

The Consultant shall submit an invoice to the Client for that part of the design of the Project completed in the immediately preceding month calculated upon the basis of the Consultant's estimate of the cost of that part of the Project, and, if the Client agrees with such estimate and that such part has been completed, the Consultant will be paid the amount of the fee so invoiced. Interest at the annual rate of ____ percent (____ percent monthly) will be paid on the total outstanding unpaid balance commencing 30 days after the Client has received the Consultants' invoice.

(b) On Award of Contract

Following the award of the contract for the construction of the Project, the Consultant shall recalculate his fee on the basis of the tender quantities and prices on which the contract for the construction of the Project was awarded, plus the estimated cost of materials and other services supplied by the Client and upon such recalculation, the amount paid to the Consultant shall be adjusted to equal the full amount of the recalculated fee including the repayment by the Consultant of any overpayment made to the Consultant.

(c) Delay of Award of Contract

In the event the contract for construction of the Project is not awarded within ____ months of the acceptance of the Design by the Client the final fee for design shall be determined as in paragraph (a) above, and paragraph (b) shall not apply.

APPENDIX 1
SAMPLE PROFESSIONAL SERVICES AGREEMENT

Further services for the Project beyond the ____ months will be undertaken on a time basis.

(d) On Completion of the Work

Following Completion of the Work, the Consultant shall recalculate his fee on the basis of the actual cost of the work and upon such recalculation the amount paid to the Consultant shall be adjusted to equal the full amount of the recalculated fee including the repayment by the Consultant of any overpayment to the Consultant.

3.3.3 Lump Sum Fee/Negotiated Fee

(a) Compensation

The Client will compensate the Consultant in accordance with the fees and charges for services as set out in the proposal or as otherwise mutually agreed. All fees and charges will be payable in Canadian funds unless noted otherwise. Invoices will be due and payable, as presented and without hold backs, by the Client upon receipt. Interest on overdue accounts will be charged at the rate of __% per annum.

Any notice forwarded by prepaid registered mail shall be deemed to have been received on the fourth day following mailing thereof.

IN WITNESS WHEREOF the parties hereto have executed this Agreement the day and year first above written.

Per: _____ Title
Consultant
(I have the authority to bind the Consultant)

Chief Administrative Officer

City of Cranbrook			
Approved		Date	Ini.
Municipal Clerk	Legal & Form		
Chief Administrative Officer	Principle		
Department Head	Content		