



REQUEST FOR PROPOSAL No.

Economic Development Strategic Plan for the City of Nanaimo

ISSUED: Wednesday, January 15, 2020

CLOSING LOCATION:

Purchasing Department
2020 Labieux Road
Nanaimo, BC
V9T 6J9

CLOSING DATE AND TIME:

Proposals must be received at the Purchasing Department prior to:
3:00 PM (15:00 hrs) Pacific Time on Friday, February 14, 2020

CITY CONTACT:

Purchasing Manager
Email: purchasinginfo@nanaimo.ca
Telephone: 250-756-5319

Deadline for questions is five (5) business days before the established close date.

Proposals will not be opened publicly

Table of Contents

Table of Contents	2
1.1 Purpose.....	4
1.2 Definitions	4
2 INSTRUCTIONS TO PROPONENTS	5
2.1 Closing Date/Time/Location	5
2.2 Signature.....	5
2.3 Contact Information.....	6
2.4 Communications and Enquiries.....	6
2.5 Deadline Extension	6
2.6 Amendment to Proposals.....	6
2.7 Addenda.....	6
2.8 Examination of Contract Documents and Site.....	7
2.9 Unsuccessful Proponents	7
2.10 Error in Proposal.....	7
2.11 Withdrawal of Proposals	7
2.12 Ownership of Proposals.....	7
2.13 Opening of Proposals	7
3 PROPOSAL SUBMISSION AND EVALUATION	8
3.1 Proposal Eligibility	8
3.2 Evaluation Criteria.....	8
3.3 Proposal Content	8
3.3.1 Qualifications and Experience	8
3.3.2 Project Understanding, Methodology and Approach.....	9
3.3.3 Schedule and Capacity	9
3.3.4 Proposed Fee	9
3.3.5 Proposed Purchase Contract.....	9
3.3.6 Conflict of Interest.....	9
4 GENERAL TERMS AND CONDITIONS	11
4.1 Right of the City to Cancel the RFP Process.....	11
4.2 Acceptance and Rejection of Proposals.....	11
4.3 No Claim for Compensation	12



RFP No.

4.4	No Contract.....	12
4.5	Conflict of Interest	12
4.6	Gifts and Donations.....	12
4.7	Solicitation of Council Members and City Staff.....	12
4.8	Confidentiality and Freedom of Information	12
4.9	Sub-Consulting.....	13
4.10	Insurance	13
4.11	Workers Compensation - Safety	14
4.12	Time is of the Essence.....	14
4.13	Governing Law.....	14
4.14	Litigation Clause	14
4.15	Key Personnel	14
4.16	Contract Terms and Conditions	15
4.17	Business Licence	15
5	TERMS OF REFERENCE	
5.1	Introduction and Background	
5.2	The Strategy	
	Appendix A - Submission Form	
	Appendix B - Terms of Reference	
	SCHEDULE A - PROPOSED PURCHASE CONTRACT (TO BE PROVIDED)	



1.1 Purpose

This Request for Proposal (RFP) seeks the services of a consultant or team of consultants to provide expertise in developing an Economic Development Strategy for the City of Nanaimo.

For more detailed information regarding the project scope, refer to **Schedule A** 'Terms of Reference'.

1.2 Definitions

Throughout this Request for Proposal, the following definitions will be used:

“Contract” means any written contract duly executed by the City and the Proponent as a result of an RFP who enters into a Contract with the City.

“Closing Time” – means the date and time for the closing of this RFP as identified on the front cover, such extended date and time as determined by the City.

“City” means the City of Nanaimo located in the Province of British Columbia.

“Evaluation Team” means a team appointed by the City.

“Procurement Contact” means the individual identified in the Instructions to Proponents - Contact Information responsible for managing the RFP process through whom all correspondence will flow, including receiving all commercial and technical questions and issuing addenda to this RFP.

“Proponent” means an individual, firm or a company that submits, or intends to submit, a proposal in response to this RFP.

“Proposal” sometimes referred to as Submission - means the Proponent's response to the RFP and includes all the Proponent's attachments and presentation materials.

“RFP” means a Request for Proposal for provision of the services described herein.

Mandatory Requirements are those requirements in this RFP described with a *“must”*, *“shall”* or *“mandatory”* means a requirement that must be met in order for a Proposal to receive consideration. Failure to provide mandatory information may result in a Proposal being rejected; *“should”* or *“desirable”* means a requirement having a significant degree of importance to the objectives of this RFP.



2 INSTRUCTIONS TO PROPONENTS

2.1 Closing Date/Time/Location

It is the sole responsibility of the Proponent to submit their Proposal to the Purchasing Department prior to the established closing time. Proposals received after the noted due time WILL NOT be considered. The time clock in the Purchasing Department Office is the official time piece for the receipt of all Proposals.

Proposals shall be clearly marked RFP **XXXX - Economic Development Strategic Plan for the City of Nanaimo** and received by one of the following two methods:

a. By hand/courier:

Sealed Proposals must be addressed to:

City of Nanaimo Purchasing Department
2020 Labieux Road
Nanaimo, BC, V9T 6J9

And include:

One (1) original hard copy and One (1) digital copy (CD/DVD/memory stick)

b. By Email:

At the only acceptable electronic address: purchasinginfo@nanaimo.ca

Electronically submitted Proposals shall be deemed to be successfully received when a new email has been received by the Purchasing Department at the City of Nanaimo. The City of Nanaimo will not be liable for any delay for any reason including technological delays, spam filters, firewalls, job queue, file size limitations, or other and late receipt of Proposals will be cause for rejection of Proposal(s).

Please note: Maximum email file size limit is 8MB.

It is the Proponent's sole responsibility to ensure they allow themselves enough time to submit their Proposal prior to the established closing date and time.

Proposals received by facsimile WILL NOT be accepted.

2.2 Signature

The Proposal should include a cover letter signed by a person authorised to legally bind the Proponent to the statements made in the Response to this RFP.



2.3 Contact Information

It is the Proponent's responsibility to clarify interpretation of any matter the Proponent considers to be unclear before the Closing Time, by contacting:

Purchasing Manager

Email: purchasinginfo@nanaimo.ca

Telephone: 250-756-5319

Fax: 250-756-5327

2.4 Communications and Enquiries

All enquiries regarding this RFP are to be directed in writing or by email. Information obtained from any other source is not official and should not be relied upon. Enquires and responses will be recorded and may be distributed to all Proponents at the City of Nanaimo's option.

All enquiries must be received no less than five (5) business days before the established close date. Questions received after this date will be responded to at the City's discretion and responses cannot be guaranteed.

2.5 Deadline Extension

Any request for an extension to the closing date will only be considered if received by the Purchasing Department no less than five (5) business days before the established closing date.

2.6 Amendment to Proposals

Proposals may be amended in writing and delivered to the closing location before the closing time but not after. Such amendments should be signed by the authorized signatory of the Proponent and either hand delivered or emailed to the Purchasing Department.

2.7 Addenda

The City reserves the right to respond to questions, make clarifications and changes, in its sole discretion, to this RFP at any time prior to the Closing Time through the issuance of addenda. Proponents are cautioned to ensure they have received and reviewed all addenda (if any) prior to submitting a Proposal. All addenda issued by the City form part of this RFP. Should the City issue any addenda to the RFP, the changes will be posted on the BC Bids www.bcbid.gov.bc.ca and on the City of Nanaimo site www.nanaimo.ca/bid_opportunities/bid_opptunities.aspx only. No other notices will be issued.



2.8 Examination of Contract Documents and Site

Proponents will be deemed to have carefully examined the RFP, including all attachments, Schedules, the Contract and the Site (as applicable) prior to preparing and submitting a Proposal with respect to any and all facts which may influence the Proposal.

2.9 Unsuccessful Proponents

The successful Proponent will be notified in writing and required contractual obligations will need to be fulfilled before the work can begin. The unsuccessful Proponents will not be notified by the City, as the award information will be posted on the City's and BC Bid's websites at a time after the Closing Date. In most cases, the City may post the name of the successful Proponent.

The City will offer a debriefing to unsuccessful Proponents, on request, at a mutually agreeable time. Proponents may request debriefing within fifteen (15) business days of the award being posted. The intent of the debriefing information session is to aid the Proponent in presenting a stronger Proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

2.10 Error in Proposal

No Proposal shall be altered, amended, or withdrawn after the closing date and time of the RFP. Negligence on the part of the Proponent in preparing the Proposal confers no right for withdrawal of the Proposal after it has been opened.

While the City has made considerable efforts to ensure an accurate representation of information in each respective RFP, the information contained in the RFP is supplied solely as a guideline for the Proponent and is not necessarily comprehensive or exhaustive. Nothing in a City RFP is intended to relieve the Proponent from forming their own opinions and conclusions in respect of the matters addressed in the RFP.

2.11 Withdrawal of Proposals

The Proponent may withdraw their Proposal at any time prior to the Proposal Closing Time by submitting a written withdrawal letter to the City's Purchasing Department and the Proposal will be returned.

2.12 Ownership of Proposals

All Proposals, including attachments and any documentation, submitted to and accepted by the City in response to this RFP become the property of the City.

2.13 Opening of Proposals

Proposals will **NOT** be opened in public.

3 PROPOSAL SUBMISSION AND EVALUATION

To assist in receiving similar and relevant information, and to ensure your Proposal receives fair evaluation, the City asks Proponents to provide the following information.

3.1 Proposal Eligibility

In order for Proposals to be eligible they must:

- a) Be received on or before the established closing date and time at the location specified
- b) Include a copy of the Appendix A - Submission Form signed by an individual authorized to do so on behalf of the Proponent.

PROPOSALS NOT IN COMPLIANCE WITH THE MANDATORY REQUIREMENT WILL BE REJECTED.

3.2 Evaluation Criteria

The following criteria identify the key components on which Proposals to this RFP will be evaluated.

Item	Evaluation Criteria	Weight
1.	Qualifications and Experience	30
2.	Project Understanding, Methodology and Approach	30
3.	Schedule and Capacity	30
4.	Proposed Fee (include the number of stakeholder consultations on which your fee is based)	10
	TOTAL	100

Proposals submitted should be in enough detail to allow the City to determine the Proponent's qualifications and capabilities from the documents received. Every effort should be made to include complete details of the proposed work.

3.3 Proposal Content

Cover Letter & Signature

The Proposal should include a cover letter summarizing the Proposal and indicate why the City should select your firm. This letter should be written in English and signed by a person authorized to legally bind the Proponent to the statements contained in the Proponent's Proposal submission.

3.3.1 Qualifications and Experience

- a. Identify the key members of the proposed team including any sub-consultants, if any and highlight the relevant qualifications and experience.
- b. Specifically identify the level of experience in providing multidisciplinary services associated with economic development strategies and planning.
- c. Provide details of three (3) previous projects demonstrating the experience of the consultant with projects of similar size, scope, and complexity undertaken in the past five (5) years. Indicate the members of the proposed team involved. Include references for each with contact information.
- d. Include copies of resumes of the key personnel proposed.

3.3.2 Project Understanding, Methodology and Approach

- a. Demonstrate a clear understanding of this project and provide a detailed description of the proposed methodologies and the work approach.
- b. Articulate intentions indicating the requirements will be met and what services will be provided.
- c. Identify the roles, and relationships required.
- d. Identify expectations of the City and any support required.

3.3.3 Schedule and Capacity

- a. Provide a study schedule with major milestones leading up to a study completion dated August 31, 2020. Provide a brief outline of the capacity provisions and timelines anticipated to complete the work.
- b. Indicate the ability of the proposed team to meet the timelines of the project, their availability throughout and if there are other resources available to draw on should it be required.
- c. Identify any special resources, value-added expertise, and innovation the Proponent would be able to provide.

3.3.4 Proposed Fee

Where priced proposals are requested, include all costs to complete the scope of work including travel and disbursements. Any applicable taxes should be shown as a separate line item.

3.3.5 Proposed Purchase Contract

Proponents need to identify any specific provisions contained in this RFP with which it is unwilling or unable to comply from the attached Proposed Purchase Contract.

3.3.6 Conflict of Interest

Proponents are to include a statement in their Proposal indicating whether or not the firm or any individuals proposed to work on the contract has a possible conflict of interest, and, if so, the nature of that conflict. The Municipality reserves the right to cancel the award if any interest disclosed from any source could either give the appearance of a conflict or cause speculation as to the objectivity of the project to be developed by the awarded respondent. The Municipality's determination regarding any questions of conflict of interest shall be final.

3.4 Evaluation of Proposals

Proposals will be reviewed by an Evaluation Team comprised of 3 City staff members and 2 members of the City's Economic Development Task Force. Proposals will be evaluated on a category basis as follows:

Stage 1 – Proposal Eligibility

The City will examine all Proposals that meet the eligibility requirements as set out in Section 3.1 – Proposal Eligibility.

Stage 2 – Weighted Evaluation

The City will evaluate the eligible Proposals based on the Evaluation Criteria in Section 3.2 using a weighted evaluation scoring method. Proposals will be evaluated using a scoring scale of 1-5 with the resulting score then multiplied by the pre-determined weighted evaluation value for each particular criterion. The weighted score for each item will be added together to arrive at an aggregate (total) score for the evaluation and ranking for all Proposals. The City will assign scores at the sole discretion of the City.

Where priced Proposals are required, the following equation will be used to allocate the points. The lowest proposed price will receive the full value of the allocated points. Each additional Proponent will receive a percentage of the total possible points by dividing the proposed price into the lowest price. i.e. lowest proposed price is \$10.00 from Proponent A and the allocated points for pricing is 30 points. Proponent A receives 30 points. Proponent B submits a proposed price of \$12.00. Proponent B receives 25 points ($\$10.00/\$12.00*30=25$)

Stage 3 – Proposal Clarification

The City may at their sole discretion, invite one or more Proponents for an interview, presentation or request further clarification to address any questions or clarifications relating to Proposals. Proponents will be responsible for any costs associated with the preparation for, and attendance at, the interview, to take place at a specified location in the City. An interview can be by a format selected by the City (i.e. in-person, phone, conference call, or other.)

The City may conduct credit and reference checks as part of the evaluation process, and may request additional financial information from any Proponent, at The City's sole discretion.

Stage 4 – Re-evaluation and Adjusted Scores

The City may, if necessary, re-evaluate and assign adjusted scores to the previously determined scores of the Proponents invited for an interview based on the new or updated information received.

3.5 Acceptance or Rejection

The City may, in its sole discretion, accept or reject for its consideration any and all Proposals that contain minor and inconsequential irregularity, or where practicable to do so. The City may, as a condition of acceptance of a Proposal, request a Proponent to correct an irregularity with no change in proposed price. The determination of what is or is not a minor and inconsequential irregularity, the determination of whether to accept, waive, or require correction of an irregularity, and the final determination of the validity, will be at the sole discretion of The City.

3.6 Clarification

The City reserves the right to seek clarification from any Proponent to assist in the evaluation of its Proposal.

3.7 Negotiation and Selection

By submitting a Proposal, a Proponent accepts that a contract may be negotiated upon notification by The City with the Proponent whose Proposal is evaluated as the best value. The City reserves the right to negotiate with any Proponent, or more than one Proponent. If the parties after having negotiated in good faith are unable to conclude a formal agreement, The City and the Proponent will be released without further obligations other than any surviving obligations regarding confidentiality and The City may, at its discretion, contact the Proponent of the next best rated Proposal and attempt to conclude an agreement with it, and so on until an agreement is reached.

The City may at its discretion 1) negotiate with a Proponent to award a contract for all or a portion of the Work 2) cancel this RFP and issue a new RFP with a new scope of work, or 3) cancel this RFP in its entirety.

3.8 Commitment

Proponents are advised that the City makes no commitment under this RFP. Any commitment resulting from this RFP will be made by means of a duly authorized contract issued by the City.

4 GENERAL TERMS AND CONDITIONS

4.1 Right of the City to Cancel the RFP Process

The City is not bound to select a preferred Proponent or accept any Proposal and reserves the right in its sole discretion to postpone or cancel this RFP at any time for any reason whatsoever in accordance with the City's judgement of its best interest and to proceed with the services in some other manner separate from this RFP process.

4.2 Acceptance and Rejection of Proposals

This RFP does not commit the City, in any way to select the preferred Proponent, or to proceed to negotiations for a contract, or to award any contract.

The City reserves the right to:

- i. Accept a Proposal which is not the lowest priced;
- ii. Reject any and all Proposals, including without limitation the lowest priced Proposal, even if the lowest priced Proposal conforms in all aspects with the RFP;
- iii. Reject any Proposal at any time prior to execution of an Agreement;
- iv. Assess the ability of the Proponent to perform the contract and may reject any Proposal where, in the City's sole estimation, the personnel and/or resources of the Proponent are insufficient;
- v. Amend or revise the RFP by Addenda up to the specified closing date and time;
- vi. Reduce the Scope of Services required within the RFP and negotiate the price to reflect such change after award of an Agreement; and
- vii. Award an Agreement to the Proponent other than the one with the most points, if, in its sole determination, another Proposal is determined to be the Best Value to the City, taking into consideration the price and evaluation criteria of the RFP.

Under no circumstances shall the City be obligated to award an Agreement solely on the basis of proposed price.

The City may accept or waive a minor and inconsequential irregularity, or where applicable to do so, the City may, as a condition of acceptance of the Proposal, request a Proponent to correct a minor or inconsequential irregularity with no change in the Proposal.

The determination of what is or is not a minor or inconsequential irregularity, the determination of whether to accept, waive, or require correction of an irregularity and the final determination of the validity, will be the sole discretion of the City of Nanaimo.

4.3 No Claim for Compensation

Proponents are solely responsible for their own expenses in preparing and submitting Proposals, and for any meetings, negotiations, or discussions with the City or its representatives and Consultants, relating to or arising from this RFP. The City and its representatives, agents, Consultants and advisors will not be liable to any Proponent for any claims, whether for costs, expense, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP. Proponents agree that by participating in the RFP process, and or submitting a Proposal, they have no claim for compensation.

4.4 No Contract

By submitting a Proposal and participating in the process as outlined in this RFP, Proponents expressly agree that no contract of any kind, if formed under, or arises from this RFP, exists prior to the signing of a formal written Contract.

4.5 Conflict of Interest

Proponents shall disclose in their Proposals any actual or potential conflict of interest and existing business relationships it may have with the City, its elected officials, appointed officials or employees.

4.6 Gifts and Donations

The successful Proponent will ensure that no representative of the successful Proponent will offer or extend any entertainment, gift, gratuity, discount, or special service, regardless of value, to any employee of the City. The successful Proponent will report any attempt by any employee of the City to obtain such favours to the City of Nanaimo's City Manager.

4.7 Solicitation of Council Members and City Staff

Proponents and their agents will not contact any member of the City Council or City Staff with respect to this RFP, other than the City Representative named in this document or authorized by Purchasing, at any time.

4.8 Confidentiality and Freedom of Information

The City will retain all Proposals and they will not be returned to the Proponent except for any unopened Financial Proposals. All submissions will be held in confidence by the City. The City is bound by the Freedom of Information and Protection of Privacy Act (British Columbia) and all documents submitted to The City will be subject to provisions of this legislation.

All of the information contained within the RFP, including supplementary information provided electronically, is for the exclusive use of the Consultant team for the RFP preparation purposes

only and is not to be made publicly available in any manner. The Consultant team shall not discuss this project with any member of the public at any time, for any reason whatsoever, without the prior written approval of the City of Nanaimo.

4.9 Sub-Consulting

Using a sub-consultant is acceptable provided the sub-consultant is clearly identified in the Proposal. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the Proposal.

Sub-consulting to any firm or individual who's current or past corporate or other interests may, in the City's opinion; give rise to a conflict of interest in connection with this project will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this Request for Proposal.

Where applicable, the names of approved sub-consultants listed in the Proposal will be included in the Contract. No additional sub-consultants will be added or other changes made, to the list in the Contract without written consent of the City's Engineering Projects Manager.

4.10 Insurance

Except as may be otherwise expressly approved by the City in writing, the successful Proponent will, without limiting its obligations or liabilities herein and at its own expense, provide and maintain the following insurances with insurers licensed in British Columbia and in forms and amounts acceptable to the City:

- i. Professional Liability Insurance (Errors and Omissions) coverage of a minimum of \$500,000 per occurrence, \$1,000,000 aggregate.
- ii. Comprehensive Liability Insurance with not less than \$2,000,000 coverage per occurrence, together with a Standard Non-owned Automobile Liability. The City must be named as an additional insured on this policy and the policy shall contain a cross-liability clause.
- iii. The successful Proponent must also provide the City with a certificate issued by the insurer(s) as evidence of the coverage required on or before commencement of the project.
- iv. Each policy of insurance required under this agreement shall be maintained during the continuance of this agreement and shall not be capable of cancellation unless 30 days' notice is first given to the City.
- v. The successful Proponent must ensure that every sub-consultant provides and maintains insurance substantially in accordance with the requirements of this agreement. The successful Proponent shall be as fully responsible to the City for acts and omissions of sub-consultants and of persons employed directly or indirectly by them as for acts and omissions of persons directly employed by the successful Proponent.



RFP No.

The foregoing insurance shall be primary and not require the sharing of any loss by any insurer of the City.

The successful Proponent shall provide the City with evidence of all required insurance prior to the commencement of the Services. When requested by the City, the Proponent shall provide certified copies of required policies.

4.11 Workers Compensation - Safety

The successful Proponent shall:

- i. Hold a valid WorkSafeBC registration number for the duration of the project.
- ii. Produce a copy of a Worksafe BC registration number on or before commencement of the project.
- iii. Comply with Occupational Health and Safety Regulations.

4.12 Time is of the Essence

Time is of the essence in the Contract, if awarded. The project timeline is structured so the project can be completed by August 31, 2020.

4.13 Governing Law

This agreement shall be governed by the laws of the Province of British Columbia.

4.14 Litigation Clause

The City may, in its absolute discretion, reject a Proposal submitted by a Proponent, if the Proponent, or any officer or director of the Proponent is or has been engaged either directly or indirectly through another corporation in legal action against the City, its elected or appointed officers and employees in relation to:

- i. Any other contract for works or services; or
- ii. Any matter arising from the City's exercise of its powers, duties; or functions under the Local Government Act, Community Charter or another enactment, within the past five (5) years of the closing date of this Request for Proposal.

In determining whether to reject a Proposal under this clause, the City will consider whether the litigation is likely to affect the Proponents ability to work with the City, its Consultants and representatives and whether the City's experience with the Proponent indicates that the City is likely to incur increased staff and legal costs in the administration of a Contract if it is awarded to the Proponent.

4.15 Key Personnel

The successful Proponent will be required to maintain key members of the project team as proposed throughout the term of the Contract including but not limited to the team Lead, key staff and sub-consultants. Any proposed changes to the project team must be agreed upon in writing by the City.

4.16 Contract Terms and Conditions

A sample contract is enclosed which will form the basis of any negotiation for the Work. Proponents should clearly indicate in their Proposal any conditions in Schedule C- Proposed Purchase Contract that are not acceptable and provide proposed wording that would be acceptable.

4.17 Business Licence

The successful Proponent will be required to hold a valid City of Nanaimo business licence for the duration of the project and will be required to produce a copy of the business licence on or before commencement of the project.

5 TERMS OF REFERENCE

5.1 Introduction and Background

5.1.1 Economic Development Strategy

The City of Nanaimo invites qualified service providers to submit proposals for the development of a comprehensive Economic Development Strategy. The consultant or team of consultants must be able to provide multidisciplinary services associated with economic development strategies and planning. This project will require a consultant skilled in group facilitation, multi-agency facilitation and collaboration, analysis of opportunities and strategy formulation. To be considered for contract award, bidders must demonstrate experience with, and knowledge of, city competitiveness, provincial and federal economic development as demonstrated through references from clients.

5.1.2 Background

The City of Nanaimo, is a vibrant and growing regional centre on the east coast of Vancouver Island with a population of 98,957 (2019 BC stats). With its large protected harbour, Nanaimo is referred to as the Harbour City making it one of two major gateways to Vancouver Island and positioning Nanaimo as a key service and transportation hub for regional population of over 360,000 people throughout Central and Northern Vancouver Island. Nanaimo's economy traditionally relied on an abundance of natural resources. Over the past 30 years, Nanaimo's economy has diversified significantly. Retail Trade, Healthcare-Social Services, Construction, Accommodation-Food Services, Professional-Scientific-Technical and Educational Services are now the largest sectors of the economy employing over 60% of the labour force.

Nanaimo's Economic Development Strategy was last updated in 2011 and was used to guide the work of the arms-length Nanaimo Economic Development Corporation (NEDC) which closed in early 2017 and replaced with a temporary in-house municipal function. In the fall of 2019, Council endorsed a hybrid model for the delivery of economic development. This includes an In-House economic development function, operated by City Staff, and an arm's-length External Agency, incorporated and owned (primarily) by the City of Nanaimo, governed by an autonomous Board of Directors, and operated by its own staff.

An Economic Development Task Force (EDTF) led by two City Councillors has been established to oversee the process of developing the Economic Development Strategy and fully developing the model for the External Agency. The Terms of Reference for the EDTF is contained in Appendix B.

5.1.3 Update of Key Strategic Documents

The City of Nanaimo has initiated a comprehensive update of a number of key strategic policy documents to help shape the future of the City. The bulk of the work will be completed through 2020.

The following Plans will be updated:

- Nanaimo's 2008 Official Community Plan (OCP);
- 2005 Parks, Recreation and Culture Plan (PRCP);
- Active and Sustainable Transportation Plan (ASTP);
- Economic Development Strategy (EDS); and
- Water Supply Strategic Plan Update (WSSP).

The goal is to undertake the work in a coherent and cohesive manner with a seamless engagement process. The city has issued a RFP for a qualified consultant to develop and implement the coordinated engagement process for the OCP, PRCP and the other three plans. The consulting team for the Economic Development Strategy is required to coordinate community engagement with the consulting team developing the OCP and PRCP plans. Coordinating community engagement on these interrelated policy documents is intended to maximize community participation, ensure consistency between the plans, consider efficient use of resources and to avoid public confusion and potential engagement fatigue from multiple overlapping planning processes.

The City's Economic Development Strategy must take its overarching direction from City Council's strategic plan and the City of Nanaimo's Official Community Plan. One of the key pillars of Council's strategic plan is Economic Health, which has a desired outcome that "we create a vibrant culture of innovation, stewardship and partnership to encourage a diverse and healthy economy now and into the future". The Economic Development Strategy will provide the roadmap for building a thriving, resilient and prosperous region.

The purpose of the strategy is to strengthen the economic base of the region and contribute to sustainable prosperity for residents and businesses. The strategy will set the future direction for economic development in order to increase opportunities for the growth of existing businesses, the establishment of new enterprises and increased employment opportunities.

5.2 THE STRATEGY

5.2.1 Objective

To identify strategic opportunities and propose actions to seize, retain and attract new investment, job creation and wealth generation in the City of Nanaimo.

5.2.2 Scope

- 1) An environmental scan to assess the market trends influencing the economy of the City.
- 2) A review of historical studies and reports including the 2002 Economic development Strategy; 2011 Economic Development Strategy and Investment Readiness Profile; 2008 Official Community Plan; 2019-2022 Council Strategic Plan; 2019 Nanaimo Region Profile; 2012-2016 NEDC Annual Reports; Technology, Tourism, and Arts & Culture Economic Impact studies; Vancouver Island University Masterplan, Nanaimo Port Authority Strategic Plan and Nanaimo Airport Strategic Plan.
- 3) A summary of strengths, weaknesses, opportunities and threats (SWOT) as part of the situational analysis.
- 4) In-depth consultation with key industry sectors, stakeholder groups, partner organizations, and the general public for input into strategy formulation.
- 5) The identification of the approach and strategic directions required to address the economic challenges and opportunities for sustainable economic development in the region. The Strategy must include community's top economic priorities, and performance measurements to inform the work of the in-house and external Agency for a five to ten year horizon.

5.2.3 Deliverables

Expected outcomes:

- 1) A comprehensive review and interviews with stakeholders identified by the EDTF to ensure inclusion of relevant industry sectors, organizations and stakeholders engaged in economic development.
- 2) An analysis of the relevant observations and findings from the consultations. Identification of common themes, strategic directions and key drivers to position the economic base of Nanaimo.
- 3) The development of a vision and mission statement for Economic Development.

- 4) Develop and deliver a comprehensive Economic Development Strategy to guide the work of the in-house and external Agency for a five to ten year horizon. The strategy will provide relevant direction on objectives, goals and performance metrics for economic development initiatives. The strategy should also identify areas where resources can be leveraged with community and regional partners to further economic development goals. The strategy will include but not limited to the following;
 - a) Review and analyse local bylaws, policies, processes and regulations to provide recommendations on making adjustments, where necessary and appropriate, to support sustainable economic growth and diversification.
 - b) Identify strategies to maintain and strengthen the existing economic drivers in the economy. Strengthening business retention and expansion efforts to help existing businesses prosper, expand and diversify.
 - c) Develop strategies to foster a stronger nucleus of activity in key growth and emerging sectors of the economy. Identify appropriate business and investment attraction targets, tactics and metrics for measuring success. Include existing manufacturing supply chain gaps in investment attraction targets.
 - d) Identify potential land use amendments to encourage growth in high-value emerging sectors.
 - e) Define role in supporting innovation, new entrepreneurs and business start-ups.
 - f) Identify any infrastructure issues to reduce existing and potential constraints to economic growth.
 - g) Identify strategies to retain young talent, to align workforce development efforts to match the skill needs of the target industries.
 - h) Update the Investment Readiness Roadmap.
- 5) Recommend which economic priorities are best suited for delivery from the City's in-house department vs. City-Owned external agency.
- 6) Present the draft strategy report to the EDTF for review and discussion at the July meeting.
- 7) Present the Final Economic development strategy to EDTF at the September meeting.

Minimum Engagement Requirements:

For the consultation process the City anticipates the consulting team will hold eight to ten one-on-one interviews with stakeholders; two facilitated sector roundtables (up to five different industry sectors in each); and develop a questionnaire which will be distributed to the general public through the City's concurrent engagement review process. The consulting team will also participate in four EDTF meetings as follows;

- 1) Introduction meeting.
- 2) Presentation of themes and strategic directions from consulting process and facilitation of the vision and mission statement meeting.



RFP No.

- 3) Presentation of draft EDS strategy meeting.
- 4) Presentation of final EDS strategy meeting.



RFP No.

Appendix A – Submission Form

RFP# **XXXX**

Project Title: **Economic Development Strategic Plan**

(This Submission Form “must” be completed and returned with the Proposal)

The Proponent hereby acknowledges that 1) its understands and agrees with the RFP process described in this document, including without limitation that the City makes no commitment under this RFP; and 2) the information included in this Proposal is correct and it has thoroughly reviewed and has complied with the documents making up this Proposal, including all drawings and specifications as may be listed in the Index, and any amendments or addenda thereto:

The Respondent represents to the City that the individual signing this Submission Form on its behalf has proper authority to do so.

<p>CONTACT FOR ADDITIONAL INFORMATION Name: Telephone: Fax: E-Mail:</p>	<p>COMPANY NAME AND COMPLETE ADDRESS GST#:</p>
<p>Date:</p>	<p>Telephone: Fax: E-mail:</p>
<p>Proponent’s Name (please print)</p>	<p>Signature</p>



TERMS OF REFERENCE

ECONOMIC DEVELOPMENT TASK FORCE

PURPOSE:

The purpose of the Economic Development Task Force (the “Task Force”) is to oversee the creation of the new Economic Development Strategy and to fully develop the ownership, funding, governance, staffing and other elements of the City-owned Nanaimo Prosperity Agency.

OUTPUTS:

The following outputs are envisioned from the Task Force by the fall of 2020:

- a) Developing a request for proposal for the Nanaimo Economic Development Strategy;
- b) Evaluating and hiring a consulting firm to complete the Economic Development Strategy;
- c) Overseeing and providing feedback during the Economic Development Strategy process;
- d) Endorsing the final strategy for adoption by Nanaimo City Council;
- e) Investigating and reviewing ownership, funding, governance and staffing options for the Nanaimo Prosperity Agency; and
- f) Recommending to Council a final operating model for the Nanaimo Prosperity Agency.

TERM:

The Task Force will exist for a limited period of time in correlation to the tasks identified in the Terms of Reference. It is envisioned the work of the Task Force will be finished by the fall of 2020. Upon completion of the mandate, the Task Force will cease.

Council may, at its discretion, extend the length of time or increase the mandate of the Task Force or perhaps develop a Standing Committee to advise on economic development issues.

MEMBERSHIP:

The membership of the Task Force will be as follows:

A minimum of thirteen (13) members, representation as follows:

- 2 Council members
- 1 Snuneymuxw First Nation
- 1 Vancouver Island University
- 1 Nanaimo Chamber of Commerce
- 1 Nanaimo Port Authority
- 1 Nanaimo Airport
- 1 Community Futures
- 5 leaders from any of the following sectors:
 - Transportation and Warehousing
 - Construction
 - Health Care
 - Tourism
 - Labour Market
 - Recycling
 - Agriculture
 - Not-for-Profit
 - Manufacturing
 - Renewable Energy
 - Education
 - Technology
 - Commercial Real Estate
 - Film
 - Social Services

ELIGIBILITY:

- Task Force members should be senior-level decision makers from each of the participating organizations.
- Members of the Task Force shall be appointed on the basis of their availability, business experience, and the expertise which they can bring to the work of the Committee.
- Task Force members will have no conflict of interest with Council or the Task Force and should advise the members when a potential conflict may exist on a specific issue and recuse themselves for the duration of the discussions to which they have declared a conflict of interest; and
- Task Force members will represent knowledge, experience and perspectives of various industry sectors.

MEETING FREQUENCY:

The Task Force will meet at least monthly to achieve the outputs in the Terms of Reference and can also meet upon call of the Chair or the request of two Task Force Members.

STAFF SUPPORT:

The following City Departments may provide support to the Committee in accordance with the *City of Nanaimo Committee Operating Guidelines*:

- Community Development
- Legislative Services
- Other Staff as required

OBSERVERS & COMMUNITY SUPPORTS:

Non-voting representatives may be invited to attend the meeting specific to topics of shared interest.

TASK FORCE MEMBERS:

The Economic Development Task Force (EDTF) is comprised of Councillor Maartman (Co-Chair), Councillor Turley (Co-Chair), Mike Hooper, CEO Nanaimo Airport, Jolynn Green, Executive Director Community Futures, Ian Marr, CEO Nanaimo Port Authority, Deborah Saucier, President Vancouver Island University, Kim Smythe, Executive Director Nanaimo Chamber and five at large members of the community: Cathy Carlile, Chris Beaton, Bob Moss, Andre Sullivan, and Douglas Backhouse.