REQUEST FOR PROPOSAL

Issued: September 9, 2020

Project: Request for Proposals for Consultants for the Women Entrepreneurs-in-STEM Program in Southern Alberta

Organizational Overview

Economic Development Lethbridge (EDL) is an independent not-for-profit organization governed by a 31 member Board of Directors. The mandate of the organization is to strengthen and develop the Lethbridge economy by initiating and facilitating proactive economic development strategies and promoting our great city as an excellent place to live, learn, invest, visit and do business.

Tecconnect is a facility in Lethbridge, owned and operated by Economic Development Lethbridge, that is designed to attract, incubate and develop technology companies through commercialization of products and services. Entrepreneurial training and business advising are also provided through this venue with enhanced video conferencing capacity.

The Women Entrepreneurs-in-STEM Program is a three-year program funded through Western Economic Diversification - Women Entrepreneurship Strategy program to create a STEM centric community in southern Alberta by offering training, networking, mentorship and access to current and emerging technologies. It focuses on advancing gender equality in the STEM sector by supporting under-represented women in rural and remote regions. The Project is 100% funded by Western Economic Diversification through the Women Entrepreneurship Strategy Program. See news release https://chooselethbridge.ca/?p=0&action=news&subaction=display&ID=2581

The target audiences of these support services could include any or all of the following:

1) Women in STEM sectors in Southern AB
   - Women in STEM fields interested in exploring entrepreneurship, accessing local networking, mentorship and training in current and emerging technologies

2) Women Entrepreneurs in Southern AB interested in exploring current and emerging technologies for pivot, innovation, etc.
   - Women entrepreneurs interested in accessing local networking, mentorship and training in current and emerging technologies

3) Underrepresented Women Entrepreneurs in rural and remote regions in Southern AB
   - Women entrepreneurs in rural and remote locations who are interested in accessing local networking, mentorship and training in current and emerging technologies

STEM defined as Science, Technology, Engineering and Math
**Project Scope:**

The Women Entrepreneurs-in-STEM (WESTEM) program is here to empower, support and train all women entrepreneurs in Southern Alberta. We specialise in working with professional women in STEM fields, and helping all female entrepreneurs incorporate emerging technologies into their businesses.

Our team plans to accomplish our project scope through the following Strategic Pillars:

- Existing Start up Ecosystem Resources
- Training/Workshops
- Pre-Launch to Growth spectrum
- Resources and training for any under-represented female audience (ie Immigrant, Indigenous)
- Online delivery of workshops
- One-stop-shop for all resources and connections
- Mentoring Portal
- Southern AB Story Board for WESTEM successes and upcoming events/trends
- Funding Streams for WESTEM entrepreneurs
- Collaboration and synergies in Ecosystem to create impact
- Specific workshops to build capacity in emerging technologies
- Look at expanding philosophy to Science, Engineering and Math (STEM)
- Connecting successful WESTEM entrepreneurs for early stage coaching, advisory, support
- Connecting with resources across the globe
- Meeting influential people to support launch and growth
- Being inspired by others through access to successful WESTEM entrepreneurs
- Virtual Content
- Niche Programming
- Entrepreneur Training
- Emerging Tec Workshops
- STEM Mentorship
- Networking & Events
- Rainforest/Funding Support

To support this initiative, we are looking for amazing contractors with a passion for women entrepreneurship to submit proposals to support in all areas of business and/or STEM related fields that fall under any of the above pillars.
In particular, we are seeking Service Providers for Business Advisors/Consultants and/or Curriculum Developers/Facilitators. Details around both categories, provided below:

1) Business Advisor/Consultant:

*Definition:* Someone who has expertise in a specific realm of business and is able to address specific issues/hurdles experienced by the entrepreneur and share information and connect the entrepreneur to supports that will assist them to get to the next level in their entrepreneurial journey.

*Scope of Work:*

- Liaise with Senior Program Coordinator to receive entrepreneur referrals and for appropriate case management of entrepreneurs.
- Mandatory attendance at initial orientation session and ongoing check-ins to ensure understanding of business advising format, metric tracking and initial referral resources available.
- Provide a great impression to all entrepreneurs by demonstrating a deep sense of care, compassion and respect.
- Support entrepreneurs from various industry sectors by providing highly relevant information regarding government funding and mentoring programs, helping them access and navigate this information and ensuring an understanding of this information.
- Help entrepreneurs establish and operate a business by advising them on next steps and connecting them with the appropriate resources from within the local entrepreneurial ecosystem, provincial regional innovation networks and the Tecconnect, provincial and Federal partners.
- Maintain up-to-date metrics as agreed to in orientation (i.e. Airtable) and within 24 hours of client meeting.
- Maintain and update on-line scheduling calendar of availability, at least two weeks in advance.
- The Consultant shall provide written and verbal reports to the Client and with such other information as may be reasonably requested from time to time by the Client or recommended by the Consultant.
- Legal Corporation with professional liability insurance.
- Appropriate Business license.
- Experience, education or certification in the topic/category you are proposing on.

2) Curriculum Developer/Facilitator

*Scope of Work:*

Broadly the list of tasks required includes but are not limited to:

- Development and delivery of multiple series of webinars in entrepreneurial or STEM related fields with EDL/STEM Program Branding for beginner, intermediate and advanced participants available as both live and on-demand webinars. Note – as EDL/STEM is paying for the development of the content, IP ownership rights will reside with EDL/STEM.
• Development of a potential certification process for each series and/or webinar, should there be a fit.

• One-on-One coaching to augment workshop delivery. Facilitators will be expected to follow up with participants within 3 – 5 business days to offer assistance.

Additional: The consultant may be asked to perform tasks including but not limited to:

• Creating training opportunities on how STEM related topics may have business applications for women entrepreneurs, particularly in areas of agriculture and AgriFood, manufacturing and supply chain.

• Developing curriculum consistent with pedagogic principles of applied learning.

• Curriculum Development formatted with details as follows: Live & Virtual on-demand presentations minimum 1 hour to maximum 2.5 hours in length for singular session, or up to 6 week series sessions. Please provide any details, such as:
  - Webinar titles,
  - learning objectives,
  - target audience,
  - minimum/maximum class size,
  - mode of delivery,
  - content details of curriculum,
  - content overview,
  - hours of instruction,
  - prerequisites,
  - equipment and software requirements,
  - certification completion requirements for single or series live/virtual on-demand webinars,
  - where on the Start Up Continuum your material would fit.
Follow up surveys for sessions will be circulated and feedback from participants will be shared with the facilitator(s). Time should be included for ongoing continuous improvement of content following feedback from participants. Frequency and duration of programming will be influenced by participant feedback, as well.

- Qualifications, Experience and Preferences.
- Legal Corporation with professional liability insurance.
- Appropriate Business license.
- Experience, education or certification in the topic/category you are proposing on.

- Experience developing and delivering curriculum. Instructor will lead training through a video conferencing platform through Tecconnect. Presentations will include access to PowerPoint and other instructional material during live training with download capability as well as the option to have sessions recorded for later review through system archives. Registrants must have access via audio or real time chat box functions to interact with the instructor and fellow students. On-demand training must also be available allowing registrants to access material during a time definite period. The proposal should describe training format as facilitated or self-paced and include information outlining how assignments and potential group and instructor interaction will be facilitated.

- Experience with accepted pedagogic learning practices that include auditory, tactile/kinaesthetic, visual learners and reading/writing learners in a live and virtual environment.

- Have experience applying emerging technologies to various industry sectors with an emphasis on Lethbridge region core sectors of agriculture, agri-food, supply chain and manufacturing.

- Describe the capacity to quickly modify its course offerings as emerging technologies transform in the marketplace.

- Experience providing support and education to women entrepreneurs in STEM would be considered an asset.

- Strong familiarity with Lethbridge and regional entrepreneurial ecosystem (such as RINSA) and major industry sectors would be considered an asset.

- Must be committed to providing webinars to March 2022 and provide budget from Oct 1, 2020 to March 31, 2022. Note: Workshop schedules should accommodate typical slow training periods as follows: Sept, October, November, December (but only first two weeks), January (but only last two weeks), Feb, March, April, May, June. July/August will have lighter content and have time allocated for program planning and new content development.
When submitting proposals, identify which STREAM you fall within.

**Stream 1: Business Generalist**
- Are you a current Business Advisor interested in coaching our entrepreneurs through their start up or accelerating journey? If so, apply today!
- Identify core areas of expertise that you would like to advise our entrepreneurs on ie, HR, Finance, Cashflow, Tax, Marketing, etc.

**Stream 2: STEM Professional**
- Are you a woman in a STEM profession that has the ability to support women entrepreneurs in expanding through the exploration of STEM related applications? Examples may include a) How emerging technologies could support entrepreneur’s advancement b) Engineering and Entrepreneurship, what every woman should build into their plan.
- Identify core areas of expertise that you would like to advise our entrepreneurs on ie, Emerging tech, Science, Math, Engineering.

**Evaluation Criteria**
EDL will evaluate your proposal against the Qualifications, Experience and Preferences outlined above. This may also include factors such as proposal presentation, curriculum development, key presenter(s) qualifications, timelines, price, past performance, familiarity with Lethbridge region, experience working with women entrepreneurs, experience working in STEM fields and ability to commit services to end of March 2022. The proposed schedule of events subject to the RFP are outlined below:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>Public Notice</td>
<td>Date: Sept 9, 2020</td>
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<tr>
<td>Questions Due</td>
<td>Date: Sept 18, 2020 (4:00 p.m.)</td>
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<tr>
<td>Response to Questions:</td>
<td>Date: Sept 21, 2020 (4:00 p.m.)</td>
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<td>Deadline for Receipt of Proposals:</td>
<td>Date: Oct 1, 2020 (4:00 p.m.)</td>
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<td>Notification of Vendor(s) Selection:</td>
<td>Date: Oct 15, 2020</td>
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<tr>
<td>Contract and Effective Date of Award:</td>
<td>Date: October 22, 2020</td>
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<td>Notification to all submitters:</td>
<td>Date: Immediately following a signed agreement</td>
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All questions should be directed to Suzanne Ebelher, Project Team Lead, email: Suzanne@chooselethbridge.ca by 4:00 on September 18, 2020. Responses will be emailed by 4:00 on Monday September 21 as a bcc to all who have submitted questions.

Interested parties responding to this RFP should submit the following no later than 4:00 on October 1st, 2020 to Suzanne@chooselethbridge.ca with “RFP Response – Women Entrepreneurs In STEM” in the subject line.

- A proposal, not to exceed 10 double-spaced pages in PDF file format that includes a proposed outline of Business Advisory services and/or a Training Plan for a designated topic; identify the target audience for each offering you propose.
- A fee structure aligned with the different service offerings proposed.
• Company contact information.
• Resumes for all relevant presenters and team members.
• References.
if I’m submitting proposals regarding multiple aspects, are you okay with me submitting one document that outlines the elements I’m interested in or do you want separate proposals?
One proposal should be fine, but you are welcome to submit multiple proposals for different service offerings if page limit is a restriction.

Assuming not everything will be done virtually, for clarity, should travel related expense recoveries be included in the fee structure or does WESTEM provide a standardized travel allowance?
For quoting ‘in person’ services, please include travel related expenses leveraging the attached Travel & Hospitality Guidelines links below:

City Hotel Limits:  https://rehelv-acrcd.tpsgc.pwgsc.gc.ca/acrds/preface-eng.aspx#allcityratelimits

Under stream 1, are you looking for business generalist to specifically identify which strategic pillar(s) they believe they fall under?
Business Advisors can identify with any/all of the Strategic Pillars they are interested in supporting but should also include the areas of expertise they are able to offer advice on.

Should I include a signed agreement with the proposal to simplify things if I am awarded the contract, or will WESTEM provide a standardized contract?
Economic Development Lethbridge on behalf of the WESTEM program will leverage our own standardized contract for service providers.

If I am qualified and interested in both the Business Advisors/Consultants and the Curriculum Developers/Facilitators roles, should I submit a single proposal for both or one proposal per role?
One proposal should be fine but should you feel you require the 10 pages for each proposal, we will accept 2; whatever works best for you.

For pricing of STEM related services, are you looking for a price per participant or price per workshop/webinar? Is the Women in STEM initiative funding the development and delivery of workshops? Do you want to see development costs separated from delivery costs? Will there be a cost to entrepreneurs to participate in the program?
We are looking for the price per workshop/webinar. We are covering the cost of both development and delivery so costs for each should be broken out separately. At this time there will be no charge to the entrepreneur to participate.

If multiple options for training opportunities are identified in a single proposal, would you select individual options or the package of opportunities identified in the proposal as a whole?
We will likely select the individual options that meet the objectives of the program rollout.

Can you define each of the following terms as they are used in the RFP: Qualifications, Experience, Preference
Qualifications: Professional education, Degrees, certifications in the field that you are proposing on.
Experience: Years of working in the designated field; Project experience
Preference: How do you like to train and coach individuals? In person? Virtual? Do you leverage technology to provide service? If so, what is your preferred platform(s)?

What do you require as proof of professional liability insurance? How much insurance (dollar value) do you require?
We require at least $1M of professional liability insurance. Confirmation of insurance may be requested at the time of short listing companies.

What do you require as proof of a valid business license?
A copy of your incorporation document and/or business license from the city of residence.

Do you require proof (certificates?) of applicants' educational background and certifications?
This may be asked for should you make it to the short list of service providers but are welcome to include any relevant documents in the appendix.

Can you say more about what is meant in the following statement? "Describe the capacity to quickly modify its course offerings as emerging technologies transform in the marketplace." (page 5)
As new technologies come on line and have an impact in the market place (similar to the impact Block Chain had), can you demonstrate how you are in tune to new emerging technologies and how you can learn it and train participants on it so they can leverage it for their business if a fit.

I need more information on budget please.
We would suggest submitting a proposal breaking down anticipated hours for development, delivery, coaching with an hourly rate assigned to each, and all will be considered.

What is your client demographic? Are they seasoned business owners? Students? Start-ups? How large are their companies? Revenue? Employees?
Client demographic is all women in southern AB... can be an new entrepreneur or existing entrepreneur... or a women working in STEM wanting to branch out into entrepreneurship.
What is their desired time commitment? When and how would they like to learn? Evenings, weekends, daytime? Online? In person? We are still conducting primary research on this question... So far, many are women working full time so evenings/lunches are strong possibilities.

I need more information on budget please. Everything we create is customized according to the client requirements. We left the RFP quite open when looking at budget as we know there are different approaches companies may take. We would suggest submitting a proposal breaking down anticipated hours for development, delivery, coaching with an hourly rate assigned to each, and all will be considered.

Can the proposal be formatted within a table or do you just want standard word/text? The Proponent can submit the proposal in whatever format they choose; they just need to adhere to the page restrictions as outlined in the RFP.