



***The Professional Path
to Global Markets***

Request for Proposals (RFP)
For
Research, Writing and Teaching Services to address human resource
issues facing agriculture businesses across Canada

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1. Introduction

1.1 Project Summary

Goal: For the development and delivery of three customized FITT Going Global introductory workshops for the Canadian Agricultural Human Resource Council (CAHRC), with the specific aim of addressing knowledge gaps in markets and commodities specific to primary agriculture.

Objectives: The project will provide the following:

- ✓ A report summarizing a literature review, gap analysis and communications with key government departments and agricultural groups. This report will summarize gaps in markets and commodities specific to primary agriculture. The report will help to guide the modification of existing FITT Going Global workshop materials specific to addressing these agricultural knowledge gaps.
- ✓ Three customized Going Global workshops, aimed at addressing knowledge gaps in markets and commodities specific to primary agriculture (as defined in report identified above). All materials for the customized courseware will be developed in a print-ready state (including Participants Guide, Facilitators Guide and Instructor slides) in both English and French.
- ✓ Pilot testing for each customized Going Global workshop (three in total).
- ✓ A finalized partnership strategy and agreement between FITT and CAHRC for the delivery of these customized Going Global workshops, targeted to entrepreneurs with selected export-ready commodities

1.2 About FITT

Established in 1992 as part of Canada's Sector Council Program, FITT works to identify and address current and anticipated human resource skills and learning challenges while implementing long-term, human resources planning and development strategies for individuals and businesses involved in international trade. FITT is a not-for-profit organization governed by a volunteer Board of Directors that represents the industry we serve—businesses, individuals and educators involved in international trade.

FITT equips individuals and businesses with the practical skills they need to succeed in today's competitive global marketplace. A non-profit organization established by industry and government, FITT develops international business programs, sets competency standards, and designs the certification and accreditation programs for the Certified International Trade Professional (CITP*) designation. Our programs and services address human resource issues by providing employers with resources to build their international business capacity; assisting individuals in developing their international business skills and knowledge; and providing international business training support for educators and students. Centered on best practices and developed by leading global business experts, FITT's resources are the standard of excellence for trade practitioners.

Our Mission

FITT is committed to developing and providing quality programs, services and professional certification in international trade designed to prepare businesses and individuals to compete successfully in world markets.

FITT Activities

FITT programs and services benefit all individuals and businesses involved in international trade including employers, practitioners, educators, and students. The activities undertaken by FITT in support of international trade include the following:

- Identification of international trade knowledge and competency gaps that most commonly impede the success of business
- Development of international trade curriculum, standards, and a certification system for trade practitioners
- Outreach to private, public and education sectors to build the skills and knowledge required to successfully compete in international trade

1.3 About CAHRC

The Canadian Agricultural Human Resource Council (CAHRC) was created on September 16, 2006. Led by industry, and funded through the Sector Council Program of Human Resources and Skills Development Canada, the Council was set up to address the human resource issues facing agriculture businesses across Canada.

The Council's VISION is a qualified and motivated workforce that is sufficient to sustain profitable agriculture in Canada.

The Council's MISSION is to research, develop and communicate solutions to human resource issues identified by Canadian primary agriculture.

The Council's SCOPE represents farming in all its forms: raising traditional and non-traditional livestock; producing, cultivating, growing, harvesting or collecting conventional and non-conventional agriculture commodities; and any practices performed as an integral part of an agricultural operation.

To accomplish its mission and achieve its vision, the Canadian Agricultural Human Resource Council is working to generate greater awareness amongst the agriculture industries, governments, and education institutions of human resource management issues and best practices—and the Council's role in addressing these issues. Increasing partnerships with stakeholders as projects are developed and implemented is another important objective of the Council.

1.4 RFP Objective

The objective of this RFP is for FITT to obtain research, writing and teaching services from a qualified provider to perform the project described in Section 2 of this RFP.

1.5 Background – Agricultural sector knowledge gaps

Canada's agriculture sector operates in a global economy. Businesses need the skills and knowledge to market their products locally as well as globally. This project will provide customized training that will enhance the skills and knowledge of agricultural entrepreneurs interested in taking their businesses globally, by providing:

- agriculture specific information that outlines the steps involved in exporting products and services
- information and resources to help agricultural entrepreneurs identify the challenges involved in international trade and how to overcome them, and to provide access to relevant and current sources of information

1.6 About Going Global workshops

Going Global Workshops, developed by FITT in partnership with the Government of Canada, are 3-hour workshops designed to help individuals and organizations make crucial exporting and/or importing decisions, avoid common pitfalls and increase their understanding of international trade and foreign markets. Workshop attendees learn to identify market opportunities, leverage their resources to secure financing, negotiate partnerships with foreign distributors, and more. Going Global workshops are delivered by export service providers, educational institutions, industry associations, and private companies.

FITT currently offers the following Going Global workshops:

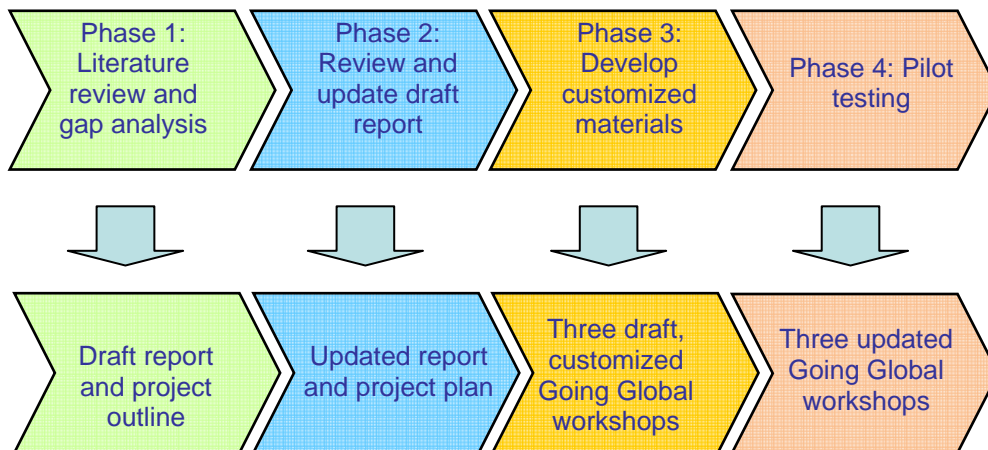
- Going Global: An Introduction to International Trade
- Going Global: An Introduction to International Market Research
- Going Global: An Introduction to International Marketing
- Going Global: An Introduction to International Trade Finance
- Going Global: An Introduction to the Cultural Aspects of International Trade
- Going Global: Global Supply Chain Management
- Going Global: Importing into Canada

2. Details of Project

2.1 Project Components and Deliverables

The approach for this assignment includes four phases, each of which will produce deliverables as illustrated below.

Figure A: Project Approach



Phase 1: Literature review and gap analysis

In this phase, the consultant will communicate with key government departments and agricultural commodity groups, as well as conduct a thorough review of existing export learning information, in order to identify gaps in markets and commodities specific to primary agriculture and define the usage of the materials to be developed. CAHRC will assist in identifying resources to be interviewed and information to be reviewed, but the consultant will also be expected to draw upon their own experience in findings suitable resources to review for this phase of the project.

This review will:

- include an overview of export-related regulatory requirements in Canada and import-related regulatory requirements in key international markets, including the United States and European nations
- consider specific export-ready agricultural commodities requiring customized resource materials to successfully market their products and services abroad, including the identification of farming products and services that are currently in demand, as well as those that are available and could easily grow as exports in the near future with the help of an exporting resource
- focus the gap analysis on the export markets and agricultural commodities where information is not readily available so as to avoid duplication with existing resources

The end deliverable of this phase is a draft report of such findings and gap analysis, as well a project outline (developed in collaboration with FITT) that will guide the development of the customized material based on the findings and gap analysis.

Phase 2: Review and update draft report

This stage consists of having the draft report reviewed by an advisory group that has been assembled by CAHRC. This same advisory group will also approve the project outline.

The advisory group will review the draft report of findings and gap analysis and provide feedback, as well as assist in determining specific export-ready agricultural commodities that require customized resource materials to successfully market their products and services abroad (including the identification of farming products and services that are currently in demand, as well as those that are available and could easily grow as exports in the near future with the help of an exporting resource). The advisory group will also assist in selecting the themes and content for the three resource modules.

The end deliverable of this phase is an updated report (based on the feedback of the advisory group) that contains recommendations on target commodities, as well as an approved project outline that will guide the development of the customized material based on the updated report.

Phase 3: Develop customized materials

This phase consists of developing the actual draft, customized workshop material, and having those materials reviewed by the advisory group. Each workshop will be based on an existing FITT Going Global workshop, which will be provided to the consultant. The exact Going Global workshops that will be customized as part of this phase will be chosen based on the findings and gap analysis from the report developed and approved in Phase 2 of this project.

Each Going Global workshop materials consist of three resource modules:

- Participant Guide (created in Microsoft Word)
- Facilitator Guide (created in Microsoft Word)
- Instructor slides (created in Microsoft PowerPoint)

After the workshops have been customized, the advisory group will review all draft workshop materials and suggest changes, if necessary. After the review comments have been incorporated by the consultant and approved by FITT and the advisory group, FITT will be responsible for editing, translating (into French), and proofreading the workshops materials. The consultant will provide any necessary updates based on those activities, and provide the final print-ready materials (English versions) to FITT.

The end deliverables of this phase are three print-ready Going Global workshops that have been reviewed and approved by the advisory group.

Phase 4: Pilot testing

This phase consists of the consultant carrying out pilot testing for each Going Global workshop created in Phase 3, in collaboration with CAHRC and FITT. As there will be three customized Going Global workshops created in Phase 3 of this project, there will be three Pilot testing activities (one for each customized Going Global workshop).

CAHRC is responsible for selecting the venues, meetings room and A/V rental, hospitality, contacting participants, hotel accommodations, and all other logistical aspects for the delivery of the Pilots. FITT is responsible for the development of feedback forms to be provided by Pilot participants, as well as for the gathering and consolidation of the feedback.

The consultant will be responsible for the actual teaching of the workshops for the Pilot participants, as well as for updating the Going Global workshops based on feedback received from Pilot participants. All travel costs for the consultant relating to the Pilot testing will be paid by FITT.

The end deliverables of this phase are three print-ready Going Global workshops that have been updated based on feedback received from Pilot participants.

2.2 Project Timeline and Requirements

LANGUAGE

The report and project plan (developed and approved in Phases 1 and 2 of this project), and customized Going Global workshop materials (developed and approved in Phases 3 and 4 of this project) can be provided in English.

FITT will be responsible for the translation of the Going Global workshop materials into French.

TIMELINE

- **Phase 1 Literature review and gap analysis** – March to June, 2010. The end deliverables of this phase are a draft report and project outline, **due no later than June 30, 2010**.
- **Phase 2 Review and update draft report** – July to August, 2010. The end deliverables of this phase are an updated report and an approved project plan, **due no later than August 31, 2010**.
- **Phase 3 Develop customized materials** – September to December, 2010. The end deliverables of this phase are three print-ready Going Global workshops that have been reviewed and approved by the advisory group, **due no later than December 31, 2010**.
- **Phase 4 Pilot testing** – January to July, 2011. The end deliverables of this phase are three print-ready Going Global workshops that have been updated based on feedback received from Pilot participants, **due no later than July 31, 2011**.

2.3 Budget

The budget for this research project is not to exceed \$67,500, as per the breakdown below:

- Phase 1 and 2 - \$15,000
- Phase 3 - \$45,000 (\$15,000 per Going Global workshop)
- Phase 4 - \$7,500 (\$2,500 per Going Global workshop)

FITT will select the provider based on the best overall value in terms of rating and cost.

3. Proposal Evaluation Criteria

Scoring - Proposals will be scored on the following criteria

Criteria	Points
Overview/Capabilities	
<ul style="list-style-type: none"> ✓ Company profile/history & primary contact information ✓ Key company/consultant strengths and differentiators from the competition (value added) 	10
Experience, Expertise, and Client References	
<ul style="list-style-type: none"> ✓ Clear outline of knowledge, skills, and experience ✓ Thorough understanding of the work required ✓ Responses from three references for which the bidder has completed similar work ✓ Demonstrated ability to meet the project objectives stated in this RFP ✓ Brief bio on each team member followed by a short listing (bullet point) of their qualifications related to this project. Roles and responsibilities of each member of the proposed team must be clearly indicated. 	15
Description of Project Methodology and Work Plan	
<ul style="list-style-type: none"> ✓ Proposed methodology ✓ Outline of collection and analysis of raw input data ✓ Includes privacy policies and storage of confidential information ✓ Provides clear and detailed descriptions of the elements of the work and activity plans ✓ Identifies who will do the work ✓ Includes timelines, milestones, and reporting methods, in accordance of the schedule proposed within the RFP ✓ Addresses expected outcomes and critical path ✓ Identifies project deliverables 	65
Financial Proposal	
<ul style="list-style-type: none"> ✓ Detail of all fees (fixed or variable) and other associated and itemized expenses, with preferred payment schedule ✓ Forecast a static cost of this project as incurred with project timeline ✓ Forecasts budget in accordance with Project Phases 	10
TOTAL:	100%

Bidders must score a minimum of seventy-five percent (75%) to be considered for selection.

4. Proposal Information & Requirements

4.1 Delivery

Questions, Letters of Intent, and Proposals must be submitted to FITT in electronic format (MSWord or .PDF) to the attention of Celeste Burnie, Senior Coordinator, Education & Certification (celeste@fitt.ca). Submitting vendor acknowledges proposal is binding and terms are both committed and withstanding. Late submissions will not be accepted.

Bidders are invited to submit formal questions via email. Responses will be sent to all bidders whom have expressed interested in submitting. No questions will be taken by phone or in person. Please direct all emails to:

Celeste Burnie
FITT
Senior Coordinator, Education & Certification
celeste@fitt.ca

4.2 Timeline

The following table presents the dates for the completion of this project. Please keep these dates in mind when completing and submitting your proposal project timeline.

Milestone/Event/Activity	Date
RFP Release	March 1 st , 2010
Question & Answer Deadline (via email only)	March 12 th , 2010
Notice of Intent to Bid	March 12 th , 2010
FITT Responses to Questions	March 19 th , 2010
Proposal Submission Deadline ("Closing Time")	March 26 th , 2010
Provider Selection	March 31 st , 2010

4.3 Proposal Submission

Vendors must direct their proposals to:

Celeste Burnie
FITT
Senior Coordinator, Education & Certification
116 Lisgar Street, Suite 300
Ottawa, ON, K2P 0C2
celeste@fitt.ca

5. Response Terms and Conditions

5.1 Questions & Clarifications

All questions regarding this RFP or requests for clarification of any item in this RFP must be submitted in writing or via email to the celeste@fitt.ca. A copy of the questions received and the responses thereto will be sent to all vendors who have indicated their intent to provide a proposal.

5.2 Offering Period

All responses must provide that the terms of the response, including the pricing proposal and project personnel, shall remain valid and binding on the proponent for a period of forty-five (45) days following the closing date to this Request for Proposal(s).

5.3 Proposal Confidentiality

All proposals submitted for consideration will be held in strict confidence.

5.4 Expenses Prior to Contract Execution

FITT is not liable for any costs incurred by a Bidder in the preparation and production of a bid or for any work performed prior to Contract execution.

5.5 Advertising Bid Results

A Bidder in submitting a bid agrees not to use the results of this bidding process as a part of any commercial or other advertising without FITT's prior written approval.

5.6 Liability for Errors

While FITT has made considerable efforts to ensure an accurate representation of information in this RFP, the information contained in this RFP is supplied solely as a guideline for respondents. The information is not guaranteed or warranted to be comprehensive or exhaustive. All responses and related materials become the property of FITT and will not be returned. FITT will not reimburse the proponent for any work related to, or materials supplied in the preparation of the RFP response. All information regarding the terms and conditions, financial and/or technical aspects of the respondent's proposal, which, in their opinion, are of a proprietary or confidential nature, must be clearly marked "PROPRIETARY" or "CONFIDENTIAL" on each item or at the top of each page. Respondents' documents and information so marked will be treated accordingly by FITT.

5.7 Declaration of Gratuities

In submitting its proposal, the respondent certifies that no representative of the respondent has offered or given a gratuity (e.g. an entertainment or gift) to any FITT employee or Board member; and intended, by the gratuity, to obtain a contract or favorable treatment under a contract.

5.8 Conflict of Interest

The respondent and all team members are to declare any potential conflict of interest between themselves and FITT or its employees.

5.9 Acceptance of Proposal

FITT reserves the right not to accept any proposal. The RFP should not be construed as a contract to purchase services. FITT shall not be obligated in any manner until a written agreement relating to an approved proposal has been duly executed.

5.10 Acceptance of RFP Conditions

Receipt of a proposal will be considered acceptance of the RFP terms and conditions by the respondent, and will be incorporated in the respondent's contract.

5.11 Notices to Potential Bidders

Receipt of these bid documents **does not** indicate that the Forum for International Trade Training (FITT) has pre-determined your company's qualifications to receive a contract award. Such determination will be made after the bid opening and will be based on our evaluation of your bid submission compared to the specific requirements and qualifications contained in these bid documents.

FITT reserves the right to:

- Reject any or all portions of any offer, to negotiate terms and conditions consistent with the solicitation, and to make an award for any or all remaining portions.
- Request references and to contact any or all references.
- Waive requirements or amend this RFP upon notification to all Vendors who have received an RFP. Mandatory requirements may be eliminated if unmet by all Vendors who have bid on the RFP.
- Adjust or correct cost or cost figures with the concurrence of the bidder if mathematical or typographical errors exist.
- Negotiate with bidders responding to this RFP within the requirements necessary to serve the best interests of FITT.
- Begin contract negotiations with another bidder in order to serve the best interests of FITT, should we be unsuccessful in negotiating a contract with the Vendor who wins the RFP bid within an acceptable time frame.
- Request clarifications from bidders for purposes of assuring a full understanding of responsiveness, and further to permit revisions from all bidders determined to be susceptible to being selected for contract award, prior to award.