

## Terms of Reference

### ECBC Corporate Planning Survey/Mandate Review

#### Introduction

Over the coming months, Enterprise Cape Breton Corporation (ECBC) will embark on a Corporate Planning process to review its current Corporate direction and to look at a five year plan. The plan is prepared on an annual basis and sets the strategic direction for the Corporation by deciding what activities the Corporation will undertake.

To that end, ECBC is seeking the services of a qualified consultant to conduct a survey of various stakeholders, on Cape Breton, in an effort to gauge their views and opinions as to the Corporation's strategic direction over the next five years.

#### Objectives

The primary objectives of this study are:

- To conduct a telephone survey of a sufficient number of businesses and stakeholders actively involved in the on-going economic development of Cape Breton to gather current relevant data for ECBC's corporate planning exercise. (Enough surveys shall be completed to ensure a margin of error of +/- 3%, 19 times out of 20). The consultant must explain methodology used to determine the relevant sample size in their proposal.
- To prepare a report that includes a comprehensive description of the results. The results shall be analyzed in **two ways**. The first is an analysis of the overall survey population as described below which includes the business population as well as other survey groups (ECBC clients, professional services, public organizations and community development groups). The second is an analysis of the business population independent of the overall survey population.

#### Methodology and Scope of Work

- The consultant shall develop a survey questionnaire that will be used to conduct a telephone survey of various ECBC stakeholders. The consultant will be responsible for

determining the order and tone of the survey questions to ensure an unbiased survey instrument. The survey instrument will be developed in consultation with the ECBC Board of Directors who will have a final sign off on the questionnaire.

- The questionnaire will be comprised of approximately ten questions. It is expected that the consultant will provide a breakdown of costs for the initial ten questions as well as a cost-breakdown for any additional questions, over and above the initial ten questions.
- The survey shall be conducted between February 16, 2006-March 8, 2006. All surveying will be completed on or before March 8, 2006.
- The consultant shall prepare a list of contacts/businesses to call from the various sources of information supplied by ECBC and by using other common data bases. It is expected that there will be many common names in the various lists. The consultant must therefore prepare a suitable contact list from all the information available. ECBC policy section will work with the consultant to provide information from previous study contact information available within house.
- In order to obtain survey opinions from both public and private stakeholders, **in all cases**, the consultant should strive to interview the **principle owner/decision maker of the respective business or organization**.
- The consultant will conduct a telephone survey to collect data from a broad sample of businesses and community leaders.
- The consultant shall get a large enough response rate such that a margin of error is +/- 3%, 19 times out of 20.
- The consultant must explain methodology used to determine the relevant sample size in their proposal.
- The consultant must ensure a good representation from the various cultural communities on Cape Breton, including the French and Aboriginal communities.
- It is essential that the consultant have bilingual services available to conduct surveys with the French communities.
- It is anticipated that ECBC will place the survey on its website. It is expected that the consultant will incorporate website responses into the overall survey results.
- Upon survey completion, the consultant will indicate the number of responses categorized on a sector by sector basis, as well as by county.

- ECBC wishes to ensure an unbiased and transparent process.

**It is expected that the consultant will survey the following population:**

**1) ECBC/CBGF Clients**

- ECBC client list (List to be provided);
- All Cape Breton Growth Fund Clients (List to be provided);

**2) Other Suggested Business**

ECBC will assist the consultant, as appropriate in providing contact information from the following businesses:

- Auto Dealers (new and used auto dealerships, including Ron May Pontiac, MacIntyre Chevrolet-Oldsmobile Ltd, Plaza Ford, Breton Toyota, Ramsay's Honda, Mazda, etc...);
- Real Estate Firms;
- Chambers of Commerce (Sydney, Strait Area, NE Highlands – member lists available from individual Chambers);
- Retail, wholesale and distributorship operations on Cape Breton (including grocery outlets);
- Service Stations and car repair businesses *Maximum of 10 surveys*;
- Contractors, Renovation Companies, Sub-trades (electricians, plumbers, etc.);
- Restaurants, including fast food locations such as Tim Hortons and Subway;
- Recreation facilities such as skiing, Golf Courses, ice rinks, etc;
- Hotels, resorts;
- Convention centres (including Membertou, Port Hawkesbury, Sydney Ports, Centre 200, Delta, etc.);
- Marketing firms (including Vibe Marketing and Icon);
- Personal Services (Hair Dressers, Aesthetics, etc.) *Maximum of 10 surveys*;
- Rental Car Agencies;
- Equipment Rental Agencies;
- Transport Companies;
- ECBC Consultant Advisory List (to be provided).

**3) Suggested Professional Services**

- Financial industries including bank managers, credit unions managers, investment brokers etc;
- Medical professions including dentists and doctors;
- Other professional firms including engineering firms, architectural firms, land surveyors and law firms involved with real estate transactions.

**4) Suggested Public Organizations**

- Cape Breton Health Authority;
- CBRM Police;
- All Mayors and Wardens on Cape Breton;
- Chiefs and CEO's of First Nation Communities on Cape Breton;
- Political and civil service representatives from all levels of government;
- Community Colleges (Strait area and Marconi - Dave Mac Lean, Bert Lewis), College de L'Acadie, Coast Guard College;
- Museums;
- Human Resources and Skills Development Canada;
- Appropriate Union representatives on Cape Breton;
- Municipal Recreation and Tourism Departments;
- Tourism Organizations (Destination Cape Breton, Destination Richmond County, etc.);
- Cape Breton University (CBU).

**5) Suggested Community Development Groups**

- Regional Development Authorities on Cape Breton (CBCEDA, SHRDA);
- Community Business Development Corporation's;
- Cape Breton Business Partnership (membership and board members);
- Development Isle Madame Association;
- Festivals and Events Applicants;
- Cape Breton Junior Chamber of Commerce;

- Le Conseil Communautaire Cheticamp Lemoine Magre.

## Report

- The consultant will prepare a report at the end of the survey which will include a comprehensive description of the results. The results shall be analyzed in **two ways**:
  - The **first** is an analysis of the overall survey population as described above which includes all surveys completed (ECBC clients, professional services, public organizations and community development groups).
  - The **second** is an analysis of the **business population independent of the overall survey population**. The survey should be carried out in such a way that the business population can be extracted from the general survey population to determine results separately.
  - For both population sets, the consultant shall indicate the number of responses categorized on a sector by sector basis, as well as by county.
- The consultant will provide ECBC with the data set collected.

## Study Schedule

As ECBC's corporate planning process is currently in progress, it is anticipated that the project will commence as soon as possible.

It is incumbent upon the consultant to lay out a time line for each step of the process including development of the questionnaire, compiling the lists of those to be surveyed into one list, carrying out the survey, and preparing a report with a description of the results.

Time is of the essence in the delivery of the report. ECBC anticipates that the survey be completed between February 16, 2006 and March 8, 2006. A DRAFT report will follow soon there after.

Target dates:

Project award – February 10, 2006

Survey complete – March 8, 2006

DRAFT report – March 28, 2006

Final Report will be due one week following written comments on the Draft Report.

The French language version of the report shall be completed three (3) weeks following acceptance of the Final Report.

## Reporting

The consultant will provide regular reports on the progress of the Project as well as meet with the steering committee at the following project milestones:

- Project Start-up;
- Weekly updates by e-mail (or equivalent means) to report on the progress of the work;
- Progress meetings as requested by ECBC; and,
- Presentation of Draft Final Report.

The consultant shall prepare and submit a draft agenda for review by the Committee prior to each meeting.

The consultant shall provide, ten (10) bound copies of the Final Report in **English and French**. The consultant shall provide an electronic version of the Final Report in Microsoft Word as well as PDF.

## Proposal Submissions

The consultant's proposal submission must include the following information:

- Corporate name and company profile;
- A description of the methodology to be followed by the consultant to meet the study's objectives;
- A statement of the consultant's understanding of the scope of the project;
- A description of the consultant's project team including a discussion of their experience and their curriculum vitae;
- A schedule of fees and expenses setting out rates of remuneration for consultant team members and an estimate of time each member will devote to the project;
- A project review schedule;
- A maximum price for the study including all expenses and HST; and
- A listing of similar projects undertaken with client references.
- Evidence of bilingual skills.

## Selection Process

The proposals will be reviewed by a Steering Committee selected by ECBC. A scoring system will be used in accordance with the proposal components listed above. The proposal with the lowest bid will not necessarily be selected. Enterprise Cape Breton Corporation (ECBC) retains the right to accept or reject any or all of the proposals received.

**Ownership of Information**

All information collected, materials gathered and reports shall be and remain the sole property of Enterprise Cape Breton Corporation (ECBC). The consultant will not be permitted to publish or in any way use the said information, materials or reports without the express and prior approval of ECBC.

**Inquiries and Proposal Submission**

Inquiries concerning this Terms of Reference shall be directed to:

Mr. Rick Beaton, Vice President  
Enterprise Cape Breton Corporation  
70 Crescent Street  
PO Box 1750  
Sydney, NS B1P 6T7  
Tel: 902-564-3618                      Fax: 902-564-2760

The consultant is required to submit three (3) bound copies of their proposal.

Proposal submissions are to be forwarded to Enterprise Cape Breton Corporation, marked as follows:

**Attention: Mary MacMullin, Purchasing Agent**  
**ECBC Corporate Planning Survey/Mandate Review**

**Proposals will be accepted until 3:00p.m., Tuesday February 7, 2006 at the address listed below:**

70 Crescent Street  
PO Box 1750  
Sydney, NS  
B1P 6T7

**Late and faxed proposals will not be accepted.**