



REQUEST FOR QUOTE

Regional Investment Attraction Workshop Series

Issued by: Central Alberta Economic Partnership (CAEP)

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1. Invitation

Central Alberta Economic Partnership (CAEP) invites qualified consultants to submit a quotation to **develop and deliver a three-part professional development workshop series for municipalities and economic development stakeholders in Central Alberta.**

The workshop series is intended to strengthen municipal economic development capacity, increase investment readiness, improve understanding of commercial real estate opportunities and trends, and enhance municipal capacity to create conditions that enable affordable and attainable housing development.

The successful consultant will work collaboratively with CAEP and relevant industry partners to develop and support the delivery of three one-day workshops:

- 1. Identifying Future Investment-Ready Sites in Central Alberta**
- 2. Opportunities and Trends in Commercial Real Estate for Municipalities**
- 3. Creating Conditions for Affordable Housing in Municipalities**

CAEP is seeking practical, current, Alberta-relevant programming that moves beyond general awareness and provides participants with tools, examples, templates, and approaches that can be applied within their own communities. CAEP's goal is to elevate locally-based skills in the communities CAEP serves.

The outcomes of these workshops will inform the development of a ***Land Development and Investment Attraction Strategy*** that will equip municipal leaders across Central Alberta with insights on how to enhance and expand their capacity for investment readiness.

2. Background

Central Alberta Economic Partnership (CAEP) is a regional economic development organization whose mission is to strengthen and grow the economy across Central Alberta. Originally created by the Government of Alberta, we are now an independent, not-for-profit organization that brings together communities, industry, and local businesses to align priorities, attract investment, and support economic growth—because we know we're stronger and more competitive when we work collectively rather than individually.

Central Alberta municipalities operate in an increasingly competitive environment for private investment, business growth, workforce attraction, and development.

Municipalities play an important role in establishing the conditions that enable investment. Land availability, servicing, planning and permitting processes, market knowledge, housing availability, and the quality of information available to investors can significantly influence development decisions.

At the same time, municipalities vary considerably in their internal resources and access to specialized expertise. Smaller and rural communities in particular may not have dedicated resources in commercial real estate, site selection, investment attraction, development feasibility, or affordable housing.

CAEP is undertaking this workshop series to build practical capacity across the region and provide municipalities with greater access to industry expertise.

The project is intended to facilitate collaboration among municipalities, economic development professionals, developers, commercial real estate professionals, planners, engineers, housing organizations, investors, and other relevant industry stakeholders.

3. Project Objectives

The overall objective of the project is to improve the ability of Central Alberta municipalities and economic development organizations to create conditions that support private investment, commercial development, business growth, and workforce housing.

The project will:

- strengthen municipal and regional investment readiness;
- improve the ability of communities to identify, assess, prepare, and communicate investment-ready development opportunities;
- increase municipal understanding of commercial real estate markets and investor requirements;
- improve alignment between municipal planning and private-sector development realities;
- strengthen municipal understanding of the relationship between housing, workforce availability, business growth, and economic competitiveness;
- provide practical tools that participants can apply following the workshops;
- expose municipalities to current private-sector perspectives and best practices;
- encourage greater collaboration among municipalities and between the public and private sectors; and
- identify practical actions municipalities can undertake to improve their competitiveness for investment.

At the conclusion of this project, CAEP expects participants to have greater knowledge, stronger industry connections, and practical resources they can use to improve investment readiness and development conditions.

The success of the project will not be measured solely by attendance. The workshop series is intended to enable municipalities to apply what they learn: identifying and improving investment-ready sites, responding more effectively to commercial development opportunities, reducing unnecessary barriers to investment, and creating conditions that support the housing supply required for sustainable regional economic growth.

4. Scope of Work

The successful consultant will be responsible for:

- developing the agenda and content of all three workshops
- identifying appropriate industry experts, case studies, tools, and speakers to participate in the workshops
- working with CAEP to create participant material for the workshops, which may include workbooks, templates and/or other tools
- working with CAEP to select and secure speakers for the workshops
- working with CAEP to develop a stakeholder and industry engagement approach for inviting participants to the workshops
- facilitating the workshops

Please note: all direct meeting costs, including speaker fees and travel expenses, facilitator travel expenses, venue costs, catering, and any other expenses associated with delivering the three workshops will be covered by CAEP.

The scope of work for this RFQ includes the following.

4.1 Project Initiation

The consultant will:

- participate in a project kickoff meeting with CAEP;
- work with CAEP to confirm a detailed work plan, timeline, workshop format, and deliverables;
- review relevant regional economic development information;
- conduct relevant research to develop the workshops;
- confirm the intended audiences and learning outcomes for each workshop; and

- develop a stakeholder and industry-engagement approach for inviting participants to the workshops.

4.2. Develop the Content for Workshop One: Identifying Future Investment-Ready Sites in Central Alberta

Purpose: Develop municipal capacity to identify, assess, prepare, document, and promote sites that are suitable for private-sector investment.

The workshop should provide participants with a practical understanding of how investors and site selectors evaluate communities and development sites.

Examples of potential workshop content could include:

- what constitutes an investment-ready site;
- differences between available land and investment-ready land;
- site-selector and investor expectations;
- ownership and land-control considerations;
- zoning and permitted uses;
- development approvals and timelines;
- water, wastewater, power, natural gas, telecommunications, and other servicing requirements;
- transportation and logistics considerations;
- environmental and geotechnical considerations;
- surrounding land uses and development constraints;
- labour force and market information;
- site due diligence;
- identifying information gaps;
- site-readiness scoring or assessment methodologies;
- preparing investment-ready property profiles;
- responding to investor and site-selector inquiries;
- presenting sites through online investment portals and marketing materials;
- regional approaches to site inventories and investment attraction; and
- Alberta and Canadian case studies.

The consultant should develop practical resources and tools for participants; these could include:

- an investment-ready site assessment checklist;

- a site information/data collection template;
- a site-readiness scoring framework or similar assessment tool;
- a sample investment property profile;
- recommended next steps for communities seeking to improve site readiness.

Workshop Outcome: participants should leave the workshop with the knowledge of how to undertake an initial assessment of potential investment sites within their municipality and identify specific actions required to improve those sites' investment readiness.

4.3. Develop the Content for Workshop Two – Opportunities and Trends in Commercial Real Estate for Municipalities

Purpose: improve municipal understanding of current and emerging commercial real estate trends and how market conditions affect development, investment, planning, infrastructure, and economic development decisions.

Examples of potential workshop content could include:

- current Alberta and Central Alberta commercial real estate conditions;
- industrial, retail, office, mixed-use, and other commercial development trends;
- investor and developer decision-making;
- changing land and building requirements;
- industrial and logistics development trends;
- retail evolution and changing consumer patterns;
- office-market changes;
- downtown redevelopment and adaptive reuse;
- redevelopment of underutilized commercial properties;
- emerging commercial asset classes;
- land economics;
- construction and development costs;
- financing and interest-rate considerations;
- municipal servicing and infrastructure decisions;
- zoning and regulatory flexibility;
- development approval timelines;
- property taxation and other municipal considerations;
- incentives and the appropriate municipal role in investment attraction;
- public-private collaboration;
- development feasibility;

- common barriers encountered by developers;
- examples of municipal practices that facilitate private investment.

The workshop should provide participants with an opportunity to hear directly from commercial real estate professionals, developers, investors, or other private-sector representatives where appropriate.

The consultant should develop practical resources and tools for participants; these may include:

- a commercial real estate trends briefing;
- a municipal commercial investment-readiness checklist;
- a developer/investor discussion guide;
- case studies;
- a checklist of municipal policies or processes that communities can examine to improve commercial development conditions.

Workshop Outcome: participants should gain a stronger understanding of the commercial development market and be better positioned to make planning, infrastructure, economic development, and policy decisions that reflect private-sector realities.

4.4. Develop the Content for Workshop Three – Creating Conditions for Affordable Housing in Municipalities

Purpose: increase municipal understanding of the policies, processes, partnerships, and market conditions that can enable additional affordable and attainable housing. The workshop should approach housing as both a community issue and an economic development issue.

Examples of potential workshop content could include:

- the relationship between housing availability, workforce attraction, and economic growth;
- affordable, attainable, workforce, rental, supportive, and market housing terminology;
- housing needs assessments;
- demographic and market analyses;
- development economics and project feasibility;
- land costs;
- servicing costs;
- construction costs;
- financing considerations;
- municipal land;

- zoning and land-use regulation;
- density and development flexibility;
- parking requirements;
- secondary suites and alternative housing forms;
- development approval processes;
- expedited approvals;
- development charges and municipal fees;
- incentives and their appropriate use;
- public-private-non-profit partnerships;
- municipal housing corporations or related models where applicable;
- working with non-profit housing organizations;
- federal housing programs and financing tools;
- examples from Alberta municipalities;
- rural and small-community housing challenges;
- practical actions municipalities can undertake without directly becoming housing developers.

The consultant should develop practical resources and tools for participants; these may include:

- a municipal housing-enablement checklist;
- a housing barriers self-assessment tool;
- a municipal policy/options matrix;
- examples of partnership models;
- a practical municipal action-planning template.

Workshop Outcome: participants should leave with a greater understanding of the municipal levers that influence housing development and a framework for identifying actions appropriate to their own communities.

4.5 Workshop Format

The successful consultant will be asked to develop agendas for the three one-day workshops.

The format should be highly interactive and may include:

- expert presentations and case studies;
- facilitated discussion;
- panel discussions;
- small-group exercises;
- scenario-based exercises;
- question-and-answer sessions; and

- facilitated action planning.

CAEP is seeking engaging workshops rather than conference-style lecture presentations.

4.6 Workshop Audience:

Participants for these workshops are expected to include:

- elected municipal officials;
- Chief Administrative Officers and senior municipal administrators;
- economic development professionals;
- municipal planners;
- development officers;
- infrastructure and engineering staff;
- municipal housing staff;
- regional economic development organizations;
- Indigenous community representatives;
- business and industry organizations; and
- other stakeholders involved in community and economic development.

Content must therefore be technically credible while remaining accessible to participants who do not have specialized backgrounds in real estate, planning, engineering, finance, or housing development.

5. Consultant Deliverables

The successful consultant will provide:

5.1 Workshop Development

- detailed agenda for each of the three workshops;
- a list of expert speakers (the consultant will work with CAEP to select and secure the speakers)
- workshop learning objectives;
- research and market information;
- presentation materials;
- exercises and case studies
- participant resources and practical tools

5.2 Workshop Delivery

- facilitation of three one-day in-person workshops in Central Alberta;
- coordination and moderation of guest speakers and/or panels;
- participant engagement and facilitated discussion;

5.3 Digital Materials

- presentation slides;
- participant workbooks;
- templates;
- worksheets;
- any other workshop materials or resources developed for the workshops.

5.4 Workshop Summary Reports

Following completion of each workshop, the consultant will provide a concise project summary containing:

- an overview of the workshop delivered;
- key themes and observations;
- participant feedback;
- opportunities or challenges identified during workshop discussions;
- recommended follow-up actions; and
- recommendations for future regional capacity-building initiatives that will be incorporated into CAEP's Regional Land Development and Investment Attraction Strategy.

6. Consultant Qualifications

We are looking for a consultant who has relevant expertise in most or all of the following:

- economic development;
- investment attraction;
- site selection or site readiness;
- commercial real estate;
- land development;
- municipal planning;
- development economics;
- affordable or attainable housing;
- municipal policy;
- facilitation and adult learning

Preference may be given to respondents demonstrating:

- direct knowledge of Alberta municipal and economic development conditions;
- experience working with rural and smaller urban municipalities;
- demonstrated private-sector development experience;
- experience translating technical subject matter for municipal decision-makers;
- experience developing and facilitating interactive workshops;
- established relationships with relevant industry experts;
- strong project management capabilities; and
- experience delivering comparable economic development initiatives.

Consultant teams or partnerships are welcome where multiple areas of expertise are required.

7. RFQ Submission Requirements

Submissions should be concise and should include the following information:

A. Consultant/Firm Information

- legal business name;
- primary contact;
- address;
- telephone;
- email; and
- website, if applicable.

B. Project Overview: Understanding of the Assignment

Provide a brief overview of your understanding of:

- the project;
- the intended audience;
- the economic development objectives; and
- the desired outcomes.

C. Proposed Approach

Provide a high level (max. of two pages) description of your proposed approach for:

- workshop development, including identifying appropriate industry experts and speakers
- engaging/inviting workshop participants;
- developing participant tools and resources;
- workshop facilitation;

Please note: we are not asking for a detailed project methodology. We are requesting a high-level description that will demonstrate your knowledge of how to deliver the scope of work and deliverables outlined in Sections 4 and 5 of this RFQ.

D. Project Team

Please identify your team's:

- project lead;
- facilitator(s) and subject-matter experts;
- subcontractors or partners; as well as
- the role of each team member

Please also include CVs for each team member, with a focus on relevant qualifications, expertise and experience.

E. Relevant Project Experience

Provide three examples of comparable projects completed within the previous five years. For each example, identify:

- client, including name, organization and contact information;
- project description;
- consultant's role;
- project start and end dates; and
- the relevance of the project to this RFQ.

References: please note that we may contact the above clients for references before making our final selection.

F. Fixed-Price Quotation

Provide a fixed-price quotation for the complete assignment, with details on how the quotation was costed.

Please note: this quote should only cover the scope of work outlined in Sections 4 and 5 of this RFQ.

- Travel costs for attending the workshops will be covered by CAEP, and should not be included in the quote (travel costs will be provided for the facilitator and speakers).
- Clearly identify applicable taxes separately.
- Respondents must identify all assumptions associated with their quotation.
- No additional fees or expenses will be paid unless authorized in writing by CAEP.

8. Evaluation of Quotations

Quotations will be evaluated according to the following criteria:

Understanding of project objectives and municipal context	10%
Proposed workshop approach	30%
Relevant experience and qualifications	25%
Industry connections and subject-matter expertise	20%
Financial quotation and overall value	15%
Total	100%

CAEP may conduct interviews with one or more respondents before selecting a preferred consultant. The lowest-priced submission will not necessarily be selected.

9. Project Schedule

The anticipated project schedule is:

- RFQ issued: August 25, 2026
- RFQ submission deadline: September 23, 2026
- Consultant selected: October 2, 2026
- Project kickoff: Week of October 5, 2026
- Workshop 1: February 3, 2027
- Workshop 2: March 3, 2027
- Workshop 3: March 24, 2027
- Summary reports submitted: March 31, 2027

10. Submission Instructions

Electronic quotations must be received by: September 23, 2026

Submit quotations in a PDF by email to:

Marta Bristow

Director, Strategic Initiatives

Central Alberta Economic Partnership

mbristow@investcentralalberta.ca

Email subject line: RFQ – CAEP Investment Attraction Workshop Series

Submissions received after the stated date may not be considered.

Please email any questions regarding this RFQ to Marta Bristow.

Where a question results in information that may be material to all respondents, CAEP may issue the response to all known proponents or publish an addendum with the RFQ.

11. General Conditions

CAEP reserves the right, in its sole discretion, to:

- accept or reject any or all quotations;
- cancel or amend this RFQ;
- request clarification or additional information;
- negotiate scope, schedule, methodology, deliverables, or price with the preferred respondent;
- waive informalities or minor irregularities;
- verify information provided by a respondent;
- contact references;
- select a respondent other than the lowest-priced respondent; and
- not award a contract as a result of this RFQ.

Respondents are responsible for all costs associated with preparing and submitting a quotation.

12. Conflict of Interest

Respondents must disclose any actual, potential, or perceived conflict of interest that could affect their ability to perform the assignment objectively.

The successful consultant will be expected to disclose any commercial relationships that could reasonably influence recommendations or workshop content.

Workshop content should be educational and objective and should not be used to promote the consultant's or another organization's products or services.

13. Insurance and Contract Requirements

The successful respondent will be required to:

- enter into a written professional services agreement with CAEP;
- comply with applicable legislation and CAEP policies while undertaking the assignment.
This includes relevant privacy laws.

Specific insurance and contract requirements will be confirmed with the preferred respondent.