



ENGAGEMENT AGREEMENT

BETWEEN:

MDB Insight Inc.

-and-

Town of Kingsville

(the "Client")

Business Retention and Expansion Project

MDB INSIGHT AND THE CLIENT AGREE AS FOLLOWS:

1. **Services.** MDB Insight will provide the services contemplated by this Agreement on the terms and conditions set out herein. The services that MDB Insight will provide under this Agreement are described in MDB Insight's proposal dated July 26, 2019 (attached as Schedule B of this Agreement) with the exception of the following modifications: there may be some adjustments to timing of work that do not affect overall scope (e.g. splitting surveying into three segments instead of one) (collectively, the services are referred to herein as the "Services").
2. **Milestones and Deliveries.** MDB Insight agrees to provide the deliverables identified in the proposal attached as Schedule B (as modified by paragraph 1 above) (the "Proposal") by the dates outlined on the timeline indicated in the Proposal (as modified by paragraph 1 above). MDB Insight also agrees to use all commercially reasonable efforts to achieve the "Milestones" set out in the Proposal.
3. **Fees and Expenses.** MDB Insight agrees to provide the Services for the fees (plus applicable taxes) provided for in the Proposal (the "Fees"). MDB Insight agrees that the Fees will not exceed a total of \$53,635, except as provided for in the Proposal or unless approved by the Client.

4. **Invoicing.** MDB Insight shall invoice for the Fees and the Expenses as per the following schedule. The Client will remit payment for the Fees and Expenses within thirty (30) days of issuance of the relevant invoice.

Signing of Contract	30% of total fees
November 10, 2019	10% of total fees
January 10, 2019	20% of total fees
March 10, 2019	20% of total fees
Completion of Project	20% of total fees

5. ~~**Sub-Contractors.** If set forth in the Proposal, MDB Insight will act as project manager and shall engage _____ names of sub-consultants _____ (or such other replacement sub-contractors as MDB Insight deems appropriate) (the "Sub-Contractors") as sub-consultants to provide certain of the Services. Provided that the Client pays MDB Insight, MDB Insight shall have the obligation to pay the Sub-Contractors for their performance of the Services. The Client shall not, without the written consent of MDB Insight, engage the Sub-Contractors to perform any services directly. The Client shall continue to communicate with MDB Insight exclusively regarding the status and scope of the Services and all financial matters unless MDB Insight agrees otherwise in writing.~~

6. **Social Media and Reference.** The Client agrees that, during the course of the contract, MDB Insight can occasionally identify this contract in its social media postings including the use of photos. Upon satisfactory completion of the Services, the Client will provide a letter of reference for use by MDB Insight in its marketing efforts.

7. **Additional Terms and Conditions.** The terms and conditions set out in Schedule A attached hereto are hereby incorporated by reference and shall form part of this Agreement. The terms set out in Schedule B attached hereto are incorporated to the extent that they do not conflict with the provisions of Sections 1 through 6, or Schedule A, of this Agreement.

8. **Notice.** Whenever any notice is required under this Agreement, it shall be given in writing to the following addresses:

To the Client: **2021 Division Road North, Kingsville, ON, N9Y 2Y9,**
pvmwest@kingsville.ca
Attention: **Peggy Van Merlo-West, Chief Administrative Officer**

To MDB Insight: **993 Princess Street, Suite 201, Kingston, ON, K7L 1H3,**
pblais@mdbinsight.com
Attention: **Paul Blais, Executive Vice-President**

Notice shall be deemed given the day following the day of delivery, if delivered personally, by fax or email, and effective five (5) days after deposit in the mail of a written notice addressed as above and sent by first class mail. Either party may change the address for notice by notifying the other

party of such change in accordance with this Section 8.

9. **Counterparts.** This Agreement may be executed in one or more counterparts, each of which shall be deemed an original but all of which together will constitute one and the same instrument.

Signatures:

MDB Insight Inc.



Per:

Name: Paul Blais

Title: Executive Vice-President

Date of Signature: September 4, 2019

The undersigned hereby agrees to be bound by the terms of this Agreement (including the terms attached hereto in the Schedules) the day of , 201 .

Town of Kingsville

Per: _____

Name: Peggy Van Merlo-West

Title: Chief Administrative Officer

I have authority to bind the Client.



SCHEDULE A

Standard Terms and Conditions of Engagement

1. **Terms to Govern.** These Standard Terms and Conditions of Engagement (“Terms”) will govern the terms of your engagement of MDB Insight Inc. unless these Terms are expressly excluded or varied by the terms of the engagement agreement to which these terms are attached (the “Engagement Agreement”). The Engagement Agreement and the Schedules attached thereto (including the Terms) are collectively referred to herein as the “Agreement”.
2. **Termination.** Unless terminated earlier as provided below, the term of the Agreement will end on the date when the deliverables required under the Proposal (as such term is defined in the Engagement Agreement) are delivered to the Client (as such term is defined in the Engagement Agreement). The Client has the right to terminate the Agreement and the Services by providing thirty (30) days written notice to MDB Insight of its intention to terminate the Agreement. In the event that the Client terminates the Agreement, the Client shall pay MDB Insight full compensation for Fees (as such term is defined in the Engagement Agreement, at the prices provided for in the Proposal) and Expenses (as such term is defined in the Engagement Agreement) incurred by it up to the termination date, as well as for reasonable time and expenses to bring its services (and those of the Sub-Contractors (as such term is defined in the Engagement Agreement) to a close in a prompt and orderly manner. MDB Insight has the right to terminate this Agreement if the Client does not fulfill any of its obligations under the Agreement. Before exercising this right to terminate, MDB Insight will provide the Client with twenty (20) days written notice to remedy such breach. While waiting for the Client to remedy its breach of its obligations, MDB Insight shall have the right to suspend any and all of the Services. If MDB Insight exercises its right to terminate this Agreement, it will not be responsible for any loss, cost or expense resulting from such termination. For certainty, except as expressly provided for in Section 2 of the Engagement Agreement, MDB Insight shall not be required to make any delivery of any deliverable until they have been paid in full for the services rendered.
3. **Internet Communication.** The Client recognizes and accept the risks associated with communicating by e-mail, including (but without limitation) the lack of security, unreliability of delivery and possible loss of confidentiality. Unless the Client requests in writing that MDB Insight not communicate with the Client by e-mail, MDB Insight accepts no responsibility or liability in respect of risk associated with its use.
4. **Basis of Advice.** MDB Insight will base its conclusions on the facts and assumptions that the Client provides to it and MDB Insight will not independently verify this information. MDB Insight’s conclusions will not otherwise take into account or anticipate any changes in law or business practices, by way of judicial, governmental or legislative action or interpretation. Unless the Client specifically request otherwise, MDB Insight will not update its advice to take any such changes into account.
5. **Client Responsibility.** The Client is responsible for providing MDB Insight with timely access to and disclosure of all relevant data, records, systems and information, and for the accuracy and completeness of all data, records and information provided to MDB Insight to perform the Services. The Client will indemnify MDB Insight, its officers, directors, employees, agents and advisors from all such claims, liabilities, costs and expenses (including legal fees and disbursements) that arise out of or in

connection with the Client's act or action, omission, default, misrepresentation or misstatement, including any of the same in respect of or contained in any data, records or information the Client supplied to MDB Insight or the Sub-Contractors or ought to have supplied to MDB Insight or the Sub-Contractors.

6. **Confidentiality.** MDB Insight will treat as such all confidential business information of the Client that is obtained from the Client in the course of performing the Services and, except as described in this paragraph, will not use such information except in connection with the performance of the Services. MDB Insight will be entitled to include a description of the Services it provided to the Client in marketing, proposal and research materials and disclose such information to third parties; provided that all such information will be rendered anonymous and not subject to association with the Client, the Client's personnel, or identifiable issues, as the case may be. The restriction in this numbered paragraph 6 will not apply to any confidential information that MDB Insight is required by law or order of any court or regulatory body with jurisdiction to disclose, that is in or subsequently enters the public domain, that is now or subsequently becomes known to MDB Insight without breach of MDB Insight's confidentiality obligation, or that is independently developed by MDB Insight.

7. **Release of Information.** The Client acknowledges that it is responsible for obtaining all consents required by law and under any applicable contracts or regulations in order for MDB Insight to receive, use and retain any information required by MDB Insight in connection with this Agreement. The Client represents and warrants that it has obtained all such consents required by law, contract or regulation and further consents to the receipt, use and retention by MDB Insight of any information provided to MDB Insight.

8. **Limitation on Liability.** MDB Insight's maximum liability to the client arising from any and all breaches of its obligations under this agreement shall be limited to the amount of fees paid to MDB Insight for the services under this agreement. The client agrees that if the client has a claim against MDB Insight and others, the client may only claim payment from MDB Insight of its proportionate share of the total liability to the client based on MDB Insight's degree of fault for the harm to the client. In no event shall MDB Insight be liable for consequential, special, indirect, incidental, punitive or exemplary damages, costs, expenses or losses (including, without limitation, lost profits, opportunity costs or failure to recognize anticipated savings). MDB Insight will not be liable in respect of any decisions made by the client based on its reports or other results of its services. For purposes of this paragraph, the term MDB Insight includes its officers, directors, agents, contractors, employees and advisors. This paragraph shall apply regardless of the form of action, damage, claim, liability, cost, expense or loss, whether in contract, statute, tort (including, without limitation, negligence) or otherwise. This limitation does not apply to matters finally determined to have resulted from the fraudulent actions of MDB Insight in performing the services.

9. **Legal Proceedings.** In the event MDB Insight is required (pursuant to government regulation, subpoena or other legal process) or requested by the Client to produce documents as a witness in relation to its services and MDB Insight is not a party to such proceedings, the Client shall reimburse MDB Insight at standard billing rates for consulting time and expenses, including reasonable legal fees, incurred in responding to such requests.

10. **Limitation Period.** No action, regardless of form, arising out of or relating to this engagement, the services or this agreement may be brought by either party more than one (1) year after all of the necessary elements for the cause of action have occurred, except that an action for non-payment may be brought by a party not later than one (1) year following the date of the last payment due to such party hereunder.

11. **Independent Contractor.** It is understood and agreed that each party is an independent contractor. Nothing in the Engagement Agreement or these terms creates any relationship of principal and agent, partnership, joint venture or any other fiduciary relationship between the parties. Neither party shall act or represent itself, directly or by implication, as an agent of the other or in any manner assume or create any obligation on behalf of, or in the name of, the other party.
12. **Force Majeure.** MDB Insight shall not be liable for delays in performance resulting from circumstances or causes beyond its reasonable control, including, without limitation, fire or other casualty, act of God, strike or labour dispute, war or other violence, or any law, order or requirement of any governmental agency or authority or professional or other regulatory body with jurisdiction.
13. **Survival.** Numbered paragraphs 1 to 11 and 13 to 17 shall survive the expiration or termination of this Agreement.
14. **Successors and Assigns.** The Agreement shall be binding on both parties their respective and heirs, executors, successors and permitted assigns. Neither party may assign, transfer or delegate any of its rights or obligations under this engagement without the prior written consent of the other party.
15. **Severability.** In the event that any provision of the terms of the Agreement are held to be invalid, void and unenforceable, then the remainder of the terms of the Agreement shall not be affected, impaired or invalidated, and each such provision shall be valid and enforceable to the fullest extent of the law.
16. **Entire Agreement.** These terms of the Agreement constitute the entire agreement between the parties concerning this engagement and supersede all other oral and written representations, understandings or agreements relating to the subject matter hereof.
17. **Governing Law and Jurisdiction.** The Agreement shall be subject to and governed by the laws of the Province of Ontario and all disputes arising hereunder or related thereto shall be subject to the jurisdiction of the Courts of the Province of Ontario, sitting in Kingston.
18. **Reports. Unless otherwise provided for in the Proposal.** The Client acknowledges and agrees that MDB Insight shall retain all right, title and interest in and to its methodologies, techniques and processes for providing the Services, (collectively, the “ACF Intellectual Property”). “ACF Intellectual Property” includes, without limitation, all rights to copyrights, trademarks, trade names, business names, trading styles, innovations, discoveries, industrial designs, trade secrets, analysis methodology and presentation, and any information of a confidential nature belonging to MDB Insight. Any report delivered by MDB Insight as a deliverable under Section 2 of the Engagement Agreement will be the property of the Client. Notwithstanding the Client’s ownership of the report, unless otherwise provided for in the Proposal, the Client shall not utilize or re-publish any excerpts of the report without obtaining the consent of MDB Insight and properly crediting MDB Insight’s report as the source of the excerpt.

SCHEDULE B

Proposal

[See Attached]



BUSINESS RETENTION AND EXPANSION PROJECT

Proposal of Services for the
Town of Kingsville

July 26, 2019 - 12:00 pm

MDB Insight

993 Princess Street, Suite 201
Kingston, ON K7L 1H3

Letter of Transmittal

July 25, 2019

Peggy Van Mierlo-West
Chief Administrative Officer
Town of Kingsville
2021 Division St. North
Kingsville, ON N9Y 2Y9

Dear Ms. Van Mierlo-West and Members of the Taskforce,

Re: Request for Proposals – Town of Kingsville Business Retention and Expansion Project

At the heart of this project is the Town of Kingsville's desire to bolster growth by strengthening and diversifying the local economy. As one of the cornerstones of economic development, a business retention and expansion (BR+E) project will support these goals by consolidating the perspectives of local businesses within a framework that clarifies needs, preferences, obstacles and opportunities. Using our award-winning Triage BR+E platform, which builds off of the strengths of the long-standing OMAFRA BRE model:

1. we will collect statistically valid data which can be used to confidently set priorities for economic development initiatives
2. we will identify the business owners who will benefit from more in-depth conversations so that the time-intensive interview process will maximize benefits to the Town and the business owners.

Together with our knowledge of the local economic landscape and depth of BR+E experience, we offer Kingsville the essential ingredients for project success. Our approach reflects our understanding of Kingsville's specific requirements and the expertise we bring as seasoned BR+E innovators. We understand that the end result of this project must provide the Town with the confidence needed to make development and planning decisions. We will collect the needed data and provide you with industry-leading analysis while also serving as champions of your economic growth objectives. Our team appreciates that improved relationships, competitiveness, and capacity are key components of the project and will look for opportunities to strengthen these while bringing additional focus and targeting to your BR+E efforts.

Please don't hesitate to contact me at 1-855-367-3535 ext. 241 if you have any questions. I look forward to working with you. I confirm that I am authorized to bind the corporation.

Sincerely,

A handwritten signature in blue ink, appearing to read "Paul Blais", is positioned above the printed name.

Paul Blais, MA, EcD, CEcD
Executive Vice-President, MDB Insight



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Cover Image: “Kingsville main street” via Wikimedia Commons user Andrea_44 (CC BY 2.0)

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1. Executive Summary

From our earliest days as a firm, MDB Insight has understood the importance of the relationship between municipalities and their business community as a key element in economic success. For Canada's southernmost town, we propose an approach to this business retention and expansion project that highlights and strengthens this relationship while generating timely, valuable data to give Kingsville reliable insights about the needs and aspirations of its business community.

A successful BR+E program builds from a solid understanding of best practices and the local business ecosystem. This project represents the Town's investment in the acquisition of what will be precise, statistically significant information about the health of local businesses and the challenges and opportunities they are facing. To deliver this information, MDB Insight proposes using our award-winning **Triage BR+E™** tool for the initial phase of this Kingsville project, largely for its affordability and the key benefits offered by our surveying methodology:

- From the outset, identifies the businesses that are either in growth mode or in decline (green and red flags) so that detailed one-on-one interviews will be most valuable. They will be with business owners that truly need assistance. This maximizes time and also is known to uncover challenges and opportunities that the municipality is not aware of.
- Identifies, with a high degree of statistical confidence, the services in the community that will drive re-investment and overall business satisfaction which helps a municipality target the initiatives it should be spending its time and money on.
- The results give you strong measures/key performance indicators that you can track and measure against in the future.

A brochure on Triage BR+E can be found in Appendix A.

Using this well-crafted, thoughtful triage approach will allow us to isolate the businesses to be included in the second phase of the project. This will involve in-person interviews with those red flag and green flag businesses identified during the triage phase. We will select these businesses to elicit a deeper understanding of their issues and to ensure that the Town's BR+E Plan incorporates a robust analysis of perspectives and priorities. This approach will allow the Town to target the most pressing priorities based on data collection that instills confidence that follow-up actions will be effective at improving the business environment.

Triage BR+E helps you take the pulse of your business community.





2. Our Understanding of the Project

The Town of Kingsville has enjoyed impressive growth in recent years. It has successfully leveraged its historic downtown and agricultural base into a thriving value-added agriculture economy, producing an exciting local food and beverage scene. Beyond four estate wineries, Kingsville is home to two excellent craft breweries, and it is safe to say Kingsville's downtown is the restaurant hub of Essex County. The long history of cottaging on Lake Erie has developed into a diverse tourism sector that showcases the best of what Kingsville has to offer.

Looking at Kingsville's booming residential development, with multiple new condo projects, seniors residences, and new subdivisions, it is evident that people are moving to Kingsville. Many of them are those looking to retire amidst world class amenities in the immediate area and in nearby Windsor-Detroit. With that residential development comes the need for business growth to service this new population.

The business landscape in Kingsville is diverse. With some of the most fertile land in Ontario and a long growing season, agriculture has always been a mainstay of Kingsville's economy. Temperate climate, innovative growers, and proximity to some of the biggest markets in Canada and the United States are all essential building blocks of Kingsville's successful agricultural sector. Labour availability and cost, access to adequate and affordable electricity are all challenges greenhouse and traditional agricultural growers may experience. With many greenhouse businesses expanding into Ohio, Michigan, and other parts of the United States, it is an important time to reach out to Kingsville's agricultural businesses to best understand those push/pull factors.

With the simultaneous growth of the service and agricultural sectors in recent years, this is an excellent time to undertake a BR+E program. This project will build relationships with the growing business community, help identify and embrace emerging opportunities, and proactively address any issues or concerns.





3. Organizational Profile

3.1 About MDB Insight

MDB Insight is one of North America's leading specialist economic development strategic planning firms. Founded in 2007, we specialize in providing economic development, workforce development, community development, and market research solutions that create real-world impact for our public and private-sector clients. We have worked extensively with communities across Ontario.

Our mission is to help people and places thrive in the 21st century economy. Our multidisciplinary team brings together expertise and on-the-ground experience and includes some of Canada's foremost thought leaders in our core practice areas.



Communities Assisted by MDB Insight's Expertise

We have completed hundreds of economic development projects focussing on strategic planning, business retention and expansion, long-term sustainability, labour supply and demand, diversification, and tourism. Our work has taken us throughout Ontario and across Canada to work with rural and urban clients in communities of all sizes.

BR+E Innovators

From our earliest days as a firm, MDB Insight has understood the importance of the relationship between municipalities and their business community as a key element in economic success. We completed many business retention and expansion projects for those clients, shaping and refining methods and approaches that delivered the most valuable results. We realized, however, that many communities struggled to invest the time and resources (staff, financial) needed to conduct these projects successfully. That resulted in our development of what is today an award-winning and innovative model called Triage BR+E.

Since launching Triage BR+E nearly 2 years ago, we've had dozens of communities of all sizes complete a project. We think it offers significant benefits for Kingsville, addressing your described requirements while adding value and taking surveying methodology one step further.

In 2017-18, we piloted Triage BR+E in two Alberta communities. They joined us to present about the pilot at the annual conferences of Business Retention and Expansion International and the Economic Developers Association of Canada.

How We Approach Our Work

Our clients' vision – the intended future that sparks an RFP – is the starting point for every consultation we undertake. Stepping back from its pages, we look at the motivation and intent behind the proposed initiative. What does it make possible? What does the future look like once it is completed? Identifying



the “why” in this way allows us to apply our best thinking to the project while looking for the opportunities, connections, and value-added offerings we might bring – those unique to MDB Insight and to our enthusiastic team. This helps us to respond not only to the goals and objectives identified by a prospective client, but also to identify possibilities that might otherwise be missed.

We customize our approach to each project to meet clients’ needs using sound research, proven methodologies, and a collaborative attitude. That means our clients achieve tangible results and vision-driven successes. MDB Insight has completed hundreds of economic development projects for communities across Canada, but our clients recognize that, despite this experience, we do not rest on our laurels – we are continually bringing new and innovative ideas to our projects.

We conduct our work to make a genuine difference, not simply to provide a plan, a report or a strategy.

Always on the Leading Edge and Doing More for Our Clients

Our expertise is integrated across our key practice areas – we work in the dynamic space where these overlap and where communities and organizations thrive. For instance, our deliberate foray into Workforce Development and Cultural Development in 2011 made us the first firm in Canada to have divisions dedicated to incorporating the economic impact of these economic foundations. Our curious and passionate team members have continued to stay in front of these changes and we have always been able to offer compelling ways in which our clients can capitalize on the opportunities they present.

Recognizing a gap between market intelligence that is available for provincial and national decision making and that which is available for local and regional decision making has led us, more recently, into another progressive and exciting aspect of economic development. In 2017, we started a Market Research and Analytics Division. The division is focused on gathering local market intelligence. The statistically reliable data from local businesses, consumers, and citizens is gathered and analyzed with methods that ensure applicability to economic development strategy and action planning.

Unique among market research firms, we combine expert survey design and interviewing capabilities with industry-leading analytics and the full depth of knowledge that is represented by MDB Insight’s national economic development, market research, and workforce development divisions.

3.2 Experience & Qualifications

MDB Insight has completed economic development projects for some of Canada’s largest urban municipalities but the majority of our work continues to be projects completed for small urban and rural communities across the country. We understand the most important trends facing growing towns and rural regions today and we have been among the innovators and thought leaders contributing to the emerging practices that are helping communities to address these issues. We have also done a considerable amount of work that is regional in scope, often combining the assets and challenges of many diverse communities within a geographic region to support collaborative initiatives and growth objectives.



Across Canada and Across Ontario

Our past work throughout Ontario is extensive and includes the completion of more than 100 economic development projects in every corner of the province. In addition, we can offer the Town of Kingsville the experience we have in working with rural towns and small cities across the country.

The satisfaction level with our work is very high and past clients regularly contact us to discuss their current needs. Not every conversation leads immediately (or ever) to paid work for us but, regardless, these conversations buoy our spirits because we know that our clients are implementing the recommendations that we worked to ensure were ambitious but relevant and achievable.

A sampling of our work across Ontario and in smaller communities elsewhere in Canada...

In Towns and Rural Communities across Canada	In Ontario
Town of Conception Bay South (NL) – Investment Attraction Strategy; Main Street Improvement Plan; Commercial Investment Attraction Slide Deck; Online Available Properties Mapping Tool; Sector Assessment	Town of Tillsonburg – Development of a High-Tech Manufacturing Cluster Model
District of Invermere (BC) – Resident Attraction and Retention Strategy	Municipality of Bayham – Economic Opportunities Report
Triage BR+E Projects in Lethbridge County, Big Lakes, Strathmore, Morinville, Grande Cache, Central Alberta (CAEP), and Grande Prairie County	Municipality of Chatham-Kent – Economic Development and Tourism Strategy; Advanced Automotive Parts Manufacturing Strategy; Bio-Composites Sector Assessment
Town of Beaumont (AB) - Our Centre-Ville Downtown Plan	Municipality of North Middlesex – Economic Development Strategy
Dennis County Development Partnership (MB) – Investment Attraction & Economic Development Strategy; Website Content Writing; Online Available Properties Mapping Tool	Town of Greater Napanee – Commercial Investment Attraction Study; Downtown Investment & Gibbard Factory Redevelopment
Town of Neepawa (MB) – Assessment of Target Industrial Sectors	Triage BR+E Projects in South Dundas, South Glengarry, Peterborough, South Stormont, and Kingston (twice)
Mid Sask Municipal Alliance (SK) – Investment Attraction Strategy	Township of Alnwick/Haldimand – 5-Year Economic Development Strategy
Cape Breton Region (NS) – NextGen Leadership Initiative	Town of Amherstburg – Community Based Strategic Plan
Town of Torbay (NL) – Economic Development Strategy; Town Centre Redevelopment Plan	Municipality of North Middlesex – Economic Development Strategy
South Okanagan – Similkameen (BC) – Foreign Direct Investment Strategy	Town of Hanover – Cultural Development Strategy
Town of Devon (AB) – Economic Development Strategy	Traditional BR+E Projects for Township of Brock, County of Middlesex, Town of Cobourg, and Durham Region Federation of Agriculture



Business Retention and Expansion

While our Triage BR+E platform is helping many clients with an affordable and reliable option, it is the depth and breadth of our experience working to elicit and understand the needs and opportunities of a business community that truly sets us apart.

Recent Award-Winning Projects

In the last 18 months, Triage BR+E has received four nominations and three awards for program excellence. They have come from Economic Developers Alberta (2018 Winner with Central Alberta Economic Partnership and 2019 Finalist with Lethbridge County), Economic Developers Council of Ontario (2019 with Municipality of South Dundas), and Newfoundland and Labrador Economic Development Association (2019 with Town of Paradise).

Other recent Triage BR+E clients include those in the image below.



MDB Insight's Chris Bandak (left) and Paul Blais (right) with EDCO President Alison Newton and Rob Hunter from South Dundas at EDCO 2018 Awards of Excellence presentation.

Other Notable Business Retention & Expansion Projects

- Durham Region Federation of Agriculture – BR+E Visitation Project and Analysis
- Central Alberta Economic Partnership – Triage BR+E Pilot Project and Toolkits
- Brazeau County (AB) – Business Visitation Program
- City of Wetaskiwin (AB) – Business Retention and Expansion Project
- Regional Municipality of Wood Buffalo – Business Visitation Pilot Project and Workshops
- Also Township of Brock, County of Middlesex, and Town of Cobourg





3.3 Accreditations and Qualifications

MDB Insight maintains several accreditations and industry qualifications, including:



Our senior team includes Certified Economic Developers (CEcD), the leading industry designation acknowledged around the world as having achieved the pinnacle of excellence in the economic development field.



We have members of the International Economic Development Council on our senior team. IEDC is the world's largest membership organization serving the economic development field, unifying and setting the standard of excellence for the discipline.



Economic Developers Association of Canada (EDAC) is Canada's national organization of economic developers pursuing excellence in the field since 1968. Several members of our team are members with Ec.D. Certification and uphold EDAC's high professional and ethical standards. Since 2007, we have provided sponsorship for EDAC's annual conference which helps to ensure a solid agenda.



EDCO provides leadership to advance economic development and support municipalities in fostering economic prosperity in the province of Ontario. Several of our team are active EDCO members and have served on the EDCO Board of Directors.



Business Retention & Expansion International is the leading professional association for this fundamental strategy for economic sustainability and growth. Our senior team includes a BREI member who is among the global ranks of economic development professionals promoting best practices for increasing economic activity and growth in both urban and rural areas.



Our senior team includes a Chartered Manager, the internationally recognized designation in management and leadership from the Canadian Institute of Management. Holders of these prestigious designations support the ongoing development of the management profession by subscribing Continuing Professional Development (CPD) and abiding by the Institute Code of Ethics.



4. Our Approach & Methodology

Triage BR+E: Collecting Statistically Valid Data and Isolating Businesses for Detailed Interviewing

Overview

A successful BR+E program builds from a solid understanding of best practices and the local business ecosystem. This project represents the Town's investment in the acquisition of what will be precise, statistically significant information about the health of local businesses and the challenges and opportunities they are facing. To deliver this information, MDB Insight proposes using our Triage BR+E platform for the initial phase of this project, largely for its affordability and the key benefits offered by our surveying methodology:

- Using a short and focused up-front survey, we identify the businesses that are growing and declining (green and red flags). From there, one-on-one interviews can be scheduled with those businesses – these are the business owners who are most likely to benefit from further support. This approach maximizes business owner time.
- We identify, with a high degree of statistical confidence, the services in the community that will drive re-investment and increase overall business satisfaction. This helps a municipality target the initiatives it should be spending its time and money on.
- The results give effective performance indicators that you can track and measure against in the future.



The suggestion is to interview 120 businesses in the first phase. Our experience is that an average of 30% - 40% of business owners who are randomly selected in the first step will identify a red or green flag situation. Out of 120 businesses that will be approximately 45 detailed interviews to be conducted. These will be 45 business owners who have already declared that a visit from the Town would be beneficial. Imagine this level of satisfaction versus spending an hour with a business owner who really does not have much to share and just wants to get on with their work. There is only so much time in a day, so we suggest using the volunteer visitors' time strategically.

Before outlining our approach in more detail, we want you to know that MDB Insight appreciates the investment made by the Town to nurture relationships with existing businesses. From your Business Recognition Program and support for the Business Improvement Area to your pending Downtown Cottam Community Improvement Plan, business-focused local and regional partnerships, and Have Your Say webpage, it is clear the Town values its relationship with businesses in the municipality. Our team will ensure that relationship-building remains front-of-mind as we connect with business owners and look for opportunities to help the Town advance these vital business links.

The Town of Kingsville is dedicated to making Kingsville a progressive and prosperous place. In fact, a key strategic priority for Kingsville Council is to "promote the betterment, self-image and attitude of the community through improved communications with residents, business owners and visitors". [Have Your Say webpage]



Initial Surveying

As mentioned earlier, we will construct a telephone interview questionnaire in close consultation with the Town. We will complete 120 telephone surveys of 10-12 minutes each to probe satisfaction with Kingsville as a place to operate a business. The survey will also assess the expected future plans of businesses and identify the most likely barriers to their growth and general health.

Understanding the Data from the 120 Surveys

We have a team of analysts that is experienced at understanding the story that your data is telling. We don't just regurgitate the numbers, we tell you "So what?".

As described in the previous section, one of the most innovative aspects of our analysis is it includes a calculation of **Derived Importance** (see sample figure). It is a quantitative technique that has been used by the private sector for decades to establish priorities. Triage BR+E will measure the degree of importance that business owners place on an issue and their thoughts on local performance – the two elements needed to rank priorities.

We will create a report and presentation that summarizes the data. This will inform preliminary recommendations and actions to improve the business environment. The benefit of having completed a large sample of businesses is the recommendations will be based on data that we know is statistically sound.

The data analysis and a resulting report will be provided to the Town and will be incorporated into the BR+E plan.

The priority matrix of issues will provide the Town with market intelligence that can be used to leverage funding from provincial and federal agencies for projects that will do the most to improve business satisfaction.

In-Person Business Visits

Budgeted for this project are more detailed, longer-form interviews business owners. Priority will be to meet with all business owners who have revealed red/green flags during the Triage survey (estimated to be 45). We want to reiterate that because of the Triage survey, there is an assurance that these face-to-

Issue	Importance	Performance	Priority
Land costs	0.483	64	1
Zoning	0.480	76	2
Support from municipality	0.521	79	3
Development/building permit process	0.420	74	4
Development charges	0.389	73	5
Municipal property taxes	0.302	68	6
Availability of serviced land	0.329	75	7
Regional/Provincial roads and highways	0.423	80	8
Local roads and streets	0.315	79	9
Availability of space for rent or lease	0.205	67	10
Support from other businesses	0.421	85	11
Off-site levy	0.450	87	12
Workforce	0.293	81	13
Support from local residents	0.542	90	14
Internet service	0.185	79	15
Water/wastewater fees	0.178	79	16
Proximity to rail	0.291	88	17
Cost of natural gas	0.092	62	18
Water/wastewater capacity	0.288	90	19
Availability of adequate housing	0.230	91	20
Cellular phone service	0.214	94	21
Quality of Life	0.442	98	22
Availability of health and medical services	0.078	92	23
Lack of business tax	0.211	99	24
Proximity to airports	0.000	70	25



Increasing
Priority



Decreasing
Priority

SAMPLE: Analysis of derived importance produces a clear ranking of business priorities (this example from Triage BR+E for Morinville, AB). This list would be customized for Kingsville.



face interviews are with businesses who need, have requested, and will appreciate, the outreach.

Interviews with businesses who did not indicate a red or green flag (or did not participate in the Triage survey) can be added. If more red/green flags are identified than 45, we will add as many as five more without additional budget. After that, choices will be made as to who participates or the Town can increase the budget for this item.

These interviews will be completed by volunteer members of the Taskforce – usually two per visit. However, as part of the volunteer training, the first few meetings will include a member of our consulting team. We like the volunteer member approach because it will ensure the project ends with business owners making a direct connection to other members of the community rather than simply outside consultants.

One of the benefits of having done the initial triage survey is that those results will give the volunteer visitors plenty of advanced intelligence on the issues that are of highest importance to each business owner. This will allow us to strategize on volunteers that should attend the appointment because of acumen in a particular area of expertise, some pre-meeting preparation that will be helpful, or even if some information from a specific organization or program would be helpful to bring to the in-person meeting. Done correctly, this will impress the business owner.

We have allocated some budget for our consulting team to assist with resolving red/green flags or completing detailed follow-up. Ultimately, for longer-term sustainability of the initiative (we assume that is a goal), the connection with the business will have to be turned completely over to the Town, but we believe that we will be able to ensure a smooth transition from consultant-only contact (initial short interview) to volunteer contact (longer in-person interview) to Town contact (red/green flag resolution).

Project Management and Preparations

MDB Insight has well-developed management protocols crafted over 10+ years and hundreds of projects. Beginning with the Project Launch Meeting, and reflected in our Project Charter, our project management approach is focused on clarity, open and regular communication, and attention to detail. This is reinforced throughout the project, with ongoing updates designed to ensure the Town will have clear and current information at all times. Project milestones are identified and carefully tracked by our experienced Project Manager, supported by the entire team and backed by contingency planning and risk mitigation strategies informed by more than a decade of experience. Our subsequent *Work Plan* and *Final Report and Action Plan Outline* are each designed to furnish additional clarity and to ensure expectations are fully addressed from the beginning. Throughout the project, Paul Blais (Project Lead) will hold overall accountability.

We want to assure the Town of Kingsville that MDB Insight has the capacity and resources to successfully complete this project on time and within budget. We maintain a generous buffer in our workload allocations in order to ensure team members have more than enough time to attend to project details. Our project managers stay abreast of team workloads and monitor project assignments carefully.



MDB Insight places quality over quantity. We commit to new projects with a critical consideration of our existing workload and capacity to deliver as promised to our clients. We make this commitment to the Town to deliver on the requirements of this RFP as detailed in our proposal.

The following tasks, duties and responsibilities were outlined in the Town's RFP and, to ensure maximum clarity, we would like to speak to each of them individually.

- **Be the primary contact and spokesperson for the BR&E project** – Paul Blais will be the Project Lead and Natasha Gaudio will be Project Manager. Justin Dias' experience in managing our Triage BR+E platform will be invaluable, but he will mostly be behind-the-scenes. We hope to discuss the Town's desire for public/media outreach and are pleased to be a spokesperson, but we will also aim to have a local person taking credit for initiatives (we will strategize in each case who that should be – Town staff, Town elected official, Taskforce member).
- **Organize and lead meetings regarding the project** – We have established a suggested timetable of project meetings that will be more with Town staff and meetings that will be with the Taskforce. Taskforce meetings will all be in-person and held at times where it is critical to get their input.
- **Coordinate the design and planning of the project** – We look forward to working with you to determine the specific target for the project.
- **Review BR&E survey and develop local community questions** – This is a specialty of ours. We have a triage questionnaire that has been refined over 30 different BR+E projects. We will review OMAFRA's longer-form in-person survey, but we know that we are going to have to customize some questions based on the market intelligence that we get in the triage surveying. We will brainstorm with the Taskforce on new questions that would be effective.
- **Dedicate sufficient time to manage and implement activities** – We have built in a healthy amount of time to ensure each stage is well managed.
- **Coordinate data collection and manage access to the data** – The data from the Triage BR+E questionnaire is seamlessly added as the survey is completed so you are not spending your money on our data entry. We will enter in the data on the responses to the longer-form survey. We are experts at Excel and so managing the data (and playing around with it to uncover interesting findings) is what we do.
- **Collect contact information for targeted businesses, print surveys and cover letters** – Even these details are not minor. We will ensure that the Taskforce members are positioned to give a great impression to participating business owners.
- **Coordinate volunteer and Taskforce activities associated with business visits** – We will ensure that the volunteers can focus their time on giving a great interview, not doing administrative tasks. We want them to have a positive experience too.
- **Collect and review completed surveys** – Yes, we will have that handled. See above for more context.
- **Assist with responses to immediate business concerns** – We have allocated budget to this aspect and appreciate that we can provide effective responses (all three of your team members have been Economic Development Officers in the past – cumulative 18 years of experience).



- **Manage the data entry and analysis process** – Yes, we will take care of that and ensure a quality control step to ensure no errors.
- **Write the final report and action plan** – We have been writing BR+E action plans since the earliest days of OMAFRA's BR+E project (Paul Blais managed one of OMAFRA's pilot projects in the early 2000s) and since then have dozens under our belts. The report and action plan will detail timelines, partners, and budget implications. The Draft will be presented to the Taskforce for member feedback. The final report will include modifications based on that feedback and will be presented to a group of the Taskforce's choosing. It could be the business community, elected officials, and/or a combination of these groups and others.
- **Coordinate action planning, program assessment and reporting** – As per the bullet point above, we will be sure to engage the Taskforce at thoughtful times during this part of the project.
- **Sign and implement confidentiality contract** – Mums the word!
- **Train and assist the taskforce members where necessary: complete a series of practice business visits and lead the taskforce BR&E through project specific training** – The Taskforce is an important group of participants and we want to leverage their knowledge of the local business community and business environment for the betterment of the project. We will work hand-in-hand with them to educate them on the importance of BR+E and train them on the intricacies of the process. We will practice interviewing with them and before setting them on their own, will complete a business interview or two with them. We have developed our own training manuals (e.g. Regional District of Wood Buffalo Business Visitation Pilot Project) and we have used OMAFRA's model. During the formative stages of the project we will discuss the pros and cons of each method and, with the Town, decide on the optimal approach.



5. Scheduling and Budgeting

5.1 Proposed Project Schedule & Milestones

The following workplan shows the project to be completed over the nine months that were identified in the RFP. Please note that each column is a two-week time frame. If there is a desire to finish sooner, there is the possibility of reducing the initiation stages of the project. Also, we have identified four weeks for triage interviewing, but this could take as little as two weeks if the business community is responsive. There are other means by which the timeline can be shortened. We have identified important points in time where the Taskforce's input will be particularly valuable.

	Sep			Oct		Nov		Dec		Jan		Feb		Mar			Apr		May	
	1	15	29	13	27	10	24	8	22	5	19	2	16	1	15	29	12	26	10	24
Phase 1 - Project Initiation and Project Planning/Design																				
Draft Workplan and Communications Plan																				
Project Launch Meeting with Town Staff		^^^																		
Draft Triage Survey Design																				
Project Planning Meeting with Taskforce			***																	
Final Workplan, Communications Plan & Triage Survey																				
Business Directory/Target List Preparation																				
Project Update Calls with Town Staff and Taskforce Members (as desired)						^^^	^^^			^^^				^^^		^^^				
Phase 2 - Triage BR+E: Collecting Statistically Valid Data and Isolating Businesses For Detailed Interviewing																				
Notify Target Audience of Triage Outreach and Press Release																				
Surveying of Target Audience (120 Completes)																				
Thanking Target Audience																				
Analyze Questionnaire Results and Derived Importance Priority Matrix																				
Develop Triage BR+E Report																				
Presentation of Triage BR+E Findings with Taskforce & Discussion										***										
Planning Phase 3 with Taskforce (e.g. finalizing list of interviewees, preferred local questions, coordinating availability/scheduling)										***										
Phase 3 - In-Person Business Interviews																				
Draft Interview Questionnaire Design																				
Meeting with Taskforce to Review Questionnaire and Conduct BR+E Training including Practice Business Visits										***										
Finalize Interview Questionnaire																				
Development of Information Package for Visits																				
Printing Interview Forms for Volunteers																				
Scheduling and Conducting In-person Interviews (45)												***								
Phase 4 - Data Input, Data Analysis, Recommendations and Reporting																				
Data Entry																				
Data Analysis																				
Draft BR+E Plan																				
Meeting with Taskforce to Review Draft BR+E Report & Action Plan																***				
Incorporation of Feedback and Prepare Draft #2 of Report & Action Plan																				
Presentation of BR+E Report & Action Plan (audience to be determined)																			***	
Incorporation of Feedback and Finalize BR+E Report & Action Plan																				
Printing and Delivery of Final BR+E Plan and Issue Press Release																				

*** In-person Meeting

^^^ Conference call meeting



5.2 Budget and Proposed Invoicing

Our budget shows the hours which we will commit to the project. You can see that our team members have a very collaborative approach. We have included all travel expenditures, but if the Town prefers, we can receipt and invoice these separately. Often clients like to avoid this additional paperwork and we gladly oblige! If we do expense separately, we will not exceed the price outlined below.

	Paul Blais	Natasha Gaudio	Justin Dias	Section Subtotal
Hourly Rate	\$ 215	\$ 120	\$ 120	
Phase & Tasks				
Phase 1 - Project Initiation and Project Planning/Design				
Draft Workplan and Communications Plan	3	5		8
Project Launch Meeting with Town Staff	2	2	2	6
Draft Triage Survey Design	1	3	3	7
Project Planning Meeting with Taskforce	6	14	10	30
Final Workplan, Communications Plan & Triage Survey	1	5		6
Business Directory/Target List Preparation	2	2	8	12
Project Update Calls with Town Staff and Taskforce Members (as desired)	5	8	2	15
Phase 2 - Triage BR+E: Collecting Statistically Valid Data and Isolating Businesses For Detailed Interviewing				
Notify Target Audience of Triage Outreach and Press Release		3	1	4
Surveying of Target Audience (120 Completes)	2	28	28	58
Thanking Target Audience		2		2
Analyze Questionnaire Results and Derived Importance Priority Matrix	2	3	15	20
Develop Triage BR+E Report	2	2	6	10
Presentation of Triage BR+E Findings with Taskforce & Discussion		8	8	16
Planning Phase 3 with Taskforce (e.g. finalizing list of interviewees, preferred local questions, coordinating availability/scheduling)		17	8	25
Phase 3 - In-Person Business Interviews				
Draft Interview Questionnaire Design	2	8	2	12
Meeting with Taskforce to Review Questionnaire and Conduct BR+E Training including Practice Business Visits		8	8	16
Finalize Interview Questionnaire	1	1	1	3
Development of Information Package for Visits	1	3		4
Printing Interview Forms for Volunteers		3		
Scheduling and Conducting In-person Interviews (45 - 5 by consultant)		35		35
Phase 4 - Data Input, Data Analysis, Recommendations and Reporting				
Data Entry		8		8
Data Analysis	2	6	6	14
Draft BR+E Plan	3	20	3	26
Meeting with Taskforce to Review Draft BR+E Report & Action Plan	12	12		24
Incorporation of Feedback and Prepare Draft #2 of Report & Action Plan	1	3		4
Presentation of BR+E Report & Action Plan (audience to be determined)	8	4		12
Incorporation of Feedback and Finalize BR+E Report & Action Plan	1	2		3
Printing and Delivery of Final BR+E Plan and Issue Press Release		3		3
Total Project Hours	57	218	111	386
Total Professional Fees	\$ 12,255	\$ 26,160	\$ 13,320	\$ 51,735
Travel				included
Business Survey Printing, Training Materials and Related				\$ 1,700
Printing and Delivery of Final BR+E Plan (Two Copies)				\$ 200
TOTAL PROJECT FEES				\$ 53,635

We are open to invoicing approaches but provide this as a suggestion: 30% on project launch, 20% in November, 20% in January, 20% in April and 10% upon the Town's satisfaction that the project is complete. HST on the fees and disbursements will be an additional \$6,972.55.



6. Project Management

Great projects are built on trust, expertise, and innovation. MDB Insight is proud to have been part of many great project successes that have helped define communities across Canada including many in Ontario. We have gained our reputation based on collaborative approaches, visionary plans that are practical and achievable, and solutions that are actionable and measurable. Our team offers the Town of Kingsville an agile combination of expertise, experience, inspiration, and demonstrated results.

6.1 Our Expert Team for Kingsville

Our Project Team is briefly introduced here, with résumés in Appendix B.

Paul Blais, MA, Ec.D., CEcD, Executive Vice-President | Project Lead



Role on the Team: Paul will maintain careful contact with the Town on project developments and milestones. Paul will ensure project outcomes are based on rigorous and objective analysis that is in line with the project's goals and objectives. He will also participate in-person.

Paul has been active in economic development since 1995 and has more than 20 years of BR+E experience. For 10 years he held positions of increasing influence in three rural and urban municipalities. During this time, he attracted and retained over \$300 million in investment that created 600 direct jobs in a wide range of sectors including advanced manufacturing, food processing, value added forestry products, military/defense, and information technology.

Paul has worked with more than 150 communities, businesses and organizations on their economic and business development challenges. Particularly relevant to Kingsville's needs are past BRE projects and Paul's work to develop, pilot, and commercialize the innovative Triage BR+E tool specifically for MDB Insight's municipal clients. From his earliest days as a municipal economic developer in the 1990s, Paul was keen on BR+E, before it was in vogue. In fact, when working for the County of Lennox & Addington, Paul was one of three pilot communities to test drive OMAFRA's first BR+E initiative. Since then he has done dozens of BR+E projects and speaks at conferences across Canada on the topic, including Economic Developers Association of Canada and Business Retention and Expansion International. He has also conducted BR+E training from Yellowknife to Fort McMurray to Napanee to St. John's.

Paul has worked extensively across Ontario and has led a multitude of Ontario-based projects where agriculture, agri-food, economic diversification, tourism, retail, and manufacturing were among the primary objectives. His past work includes projects with Chatham-Kent, Huron, Elgin, Middlesex, Perth, St. Marys, and Stratford in the southwestern part of the province and small towns and rural communities throughout Ontario and Canada.



Natasha Gaudio, MES, Research Analyst | Project Manager



Role on the Team – As dedicated Project Manager, Natasha will be responsible for all project deliverables and day-to-day client contact. An excellent researcher, writer and communicator, Natasha will support data collection, analysis, stakeholder engagement, and contribute to the strategy and action plan.

Natasha enjoys close familial ties to Essex County, and she visits regularly. One of her family members operates a business in Kingsville so we know that we will get at least one interview completed! She has watched Kingsville develop, and always looks forward to spending time in its increasingly vibrant downtown and local food and beverage scene. Before joining MDB Insight in 2018, she worked as a practitioner in the economic development field in Northwestern Ontario for the Rainy River Future Development Corporation. During her time there, she managed a marketing alliance in partnership with 30 local businesses throughout the District. She is particularly adept at forming and maintaining relationships and working with stakeholders.

Natasha holds a Masters in Environmental Studies from York University with a joint Graduate Diploma in Business and the Environment from Schulich School of Business. She also holds a Bachelor of Arts (Hons) from University of Toronto in Canadian Studies and Urban Studies. Her interdisciplinary background provides her unique perspective to the projects she works on. She is currently pursuing her Ec.D from the University of Waterloo and Economic Developers' Association of Canada. Natasha is a member of the Economic Developers Council of Ontario.

Natasha's highlighted experience includes City of Waterloo Economic Development Strategy, City of Waterloo Strategic Plan, Economic Development & Tourism Strategy for Havelock-Belmont-Methuen, City of Dryden 5-Year Strategic Plan, Greater Moncton Labour Force Strategy, City of Port Alberni Industrial Land Inventory and Action Plan, Superior East Regional Economic Development Strategy, Peterborough & the Kawarthas Economic Development Transition Strategy, City of Brockville 5-Year Tourism Strategy, and Regional Economic Development Strategy for Taber, Alberta.

Justin Dias, BA, Research Analyst | Research & Analysis



Role on the Team – Justin is MDB Insight's manager of all Triage BR+E projects so he will be particularly active in that part of the project. However, as an economic developer for two rural communities in Southwestern Ontario, he will bring thoughts to the strategic and action planning part of the project.

Justin completed a Bachelor of Arts at Western University and a Post Graduate Certificate in Public Administration from Humber College. Prior to joining MDB Insight, he was Director of Economic Development and Community Services with the Municipality of North Middlesex where he oversaw a diverse portfolio including economic development, parks and recreation, facilities and corporate communications. He is based out of London.

Over his six years of economic development experience, Justin has worked for municipalities, non-profit workforce planning boards and the provincial government. Justin's diverse range of experience makes him adept at understanding the roles and responsibilities of all the players involved in the economic



development equation and a deep appreciation for the practical realities facing municipal professionals. Since joining MDB Insight, Justin has contributed to economic development strategies for clients across Canada. Justin also leads all Triage BR+E projects and many custom and sector-specific projects. Justin has worked with clients to develop a Triage BR+E process and communications planning that has helped generate high response rates from businesses.

Justin is a member of the Economic Developers Association of Canada (EDAC), the Economic Developers Council of Ontario (EDCO) and the Project Management Institute (PMI). His attention to detail and knowledge of current and emerging trends help to inform the background research and forward-looking recommendations he puts forward on his project engagements.

Other Talent Available for the Project

As narrow as it may appear to an outsider, those close to the industry appreciate that economic development is a broad discipline. With this in mind, MDB Insight has created the most comprehensive economic development consulting practice in Canada. Beyond the team identified here, MDB Insight has nationally-recognized thought leaders in Workforce Development (led by Trudy Parsons), and Market Research & Analytics (headed by Chris Bandak). To address implications that new economic directions may pose around infrastructure and planning policy we can consult with our staff members who have RPP and MCIP designations. Beyond these most senior team members, our Senior Consultants and Research Analysts all come with their own specialist backgrounds in economic development. You can view their bios on our web site (www.mdbinsight.com). **All of this additional expertise comes without extra cost to the project.**

A word about our staffing model...

We want the Town of Kingsville to understand how MDB Insight selects its team members and what factors have gone into building the staff team we offer to our clients. We are not typical in this regard, having no entry level staff. All MDB Insight team members have strong backgrounds and are seasoned professionals. Each has academic credentials as well as industry qualifications. This guarantees efficiencies to our clients and represents a significant value-added element in our assignments.

Executive team members each bring more than 20 years of direct experience and are recognized industry leaders in their fields. Their extensive project repertoires and well-honed expertise set them apart, and their personal attention to each project ensures actionable, realistic and tailored outcomes.

Senior Consultants are seasoned professionals, each with 6 or more years of direct experience in their specialized fields (often considerably more). They have completed a diverse range of projects and are skilled practitioners with exemplary track records. Each has demonstrated fine-tuned project management expertise and well-developed analytical and writing skills.

Research Analysts bring exceptional analytical skills and attention to detail to each project. Their project support capabilities have been developed over a diverse range of assignments. Each is adept at utilizing the latest qualitative and quantitative tools and methods to support project methodologies that produce reliable, accurate, and evidence-based outcomes.



7. References

The following projects highlight our experience with similar work that is of particular relevance to this Kingsville initiative. We would be pleased to provide work samples or additional project references upon request. Each was led by Paul Blais.

Town of Morinville – Business Retention and Expansion Triage and Action Plan

Relevance: The Town of Morinville was looking for a new and innovative approach to support its economic development efforts. This project turned out to be our pilot for Triage BR+E. In just shy of 2 years following, we have now used the platform, with overwhelming success, in dozens of other communities across Canada.

The Town of Morinville wanted to gain a better understanding of the current business environment and what challenges local businesses might be experiencing. To accomplish these objectives the Town contracted MDB Insight to conduct a statistically significant survey of the local business community. A total of 103 businesses were surveyed with a response rate of 45%.

Morinville's understanding of business ownership and size, target markets of businesses, the level of satisfaction of businesses, and their expectations for the future was enhanced by the survey. A "Derived Importance" calculation identified a statistical relationship between satisfaction levels and "room for improvement" of core services. The result was a prioritization of issues that, when addressed, will improve the local business environment.

An action plan allowed for easy identification of priorities for improving business retention and expansion assistance tools, community outreach and communications, and servicing options. The action plan focussed on four key areas that will have the greatest impact for the Town to support a better business environment. The Priority Matrix provided the community with the needed confidence to move ahead with the action plan.

Of note is that Shaun Goodeve, lead for this project in Morinville, moved to Kimberley, British Columbia and one of the first budget decisions he made was to hire us to complete a Triage BR+E. This type of repeat business is recognition of the value that this platform brings.

Schaun Goodeve, former Manager of Planning and Economic Development, Town of Morinville; now Manager of Economic Development, City of Kimberley; 340 Spokane Street, Kimberley, BC, V1A 2E8; (250) 427-5311; sgoodeve@kimberley.ca



Municipality of South Dundas Triage BR+E Project (2018)

Relevance: *This award-winning project gave South Dundas a deeper appreciation of the issues and opportunities facing local business owners and highlighted priorities for support and intervention.*

MDB Insight was contracted to work with the Municipality of South Dundas to conduct a Triage BR+E program to better understand the overall satisfaction of business owners and isolate the businesses that have opportunities or challenges that would benefit from contact with the Economic Development Department.

Targeting manufacturing in particular, we completed 100 interviews with business owners across South Dundas (from a sample of 400 businesses) to reveal priority issues and intervention opportunities of significance. The Triage BR+E™ tool was utilized including Derived Importance methodology.

The project was a resounding success due to the high quality of community engagement efforts demonstrated by the Municipality's team and a supportive business community who offered their valuable input about the economic climate of the community.

The project yielded a clear understanding of which factors are affecting overall business satisfaction in the community and provided a baseline of data that can measure progress in future business satisfaction surveys. It won an award for ingenuity at the Economic Developers Council of Ontario 2019 Marketing Awards of Excellence.

Reference: *Rob Hunter, Economic Development Officer, Municipality of South Dundas, (613) 543-4751, rhunter@southdundas.com*





Taber Regional Joint Economic Development Committee – Growing Our Economic Future

Relevance: This project exhibits MDB Insight's ability to work hand-in-hand with an advisory committee and develop aggressive, yet practical and achievable action plans. The strategy process in this small town and surrounding rural municipalities included a BR+E business-type survey (triage methodology). On the very same day that we wrapped up this proposal we fielded a call from Taber's economic developer to brainstorm their next action steps. It is absolutely thrilling to have client's move forward with the plans we have identified!

The Taber Region in rural Southern Alberta is composed of several municipalities, with no formal hierarchy, but a clear desire for regional economic advancement. The Taber Regional Joint Economic Development Committee (JEDC) has emerged to assist in regional coordination of economic development activities, but local municipalities also have their own unique concerns and opportunities. MDB Insight was contracted to develop a Regional Economic Development Strategy, supported by three additional local economic development strategies for the Town of Taber, Municipal District of Taber, and Town of Vauxhall.

The methodology was comprehensive, including statistical analysis of socio-economic and business climate, qualitative background research and the assessment of future themes, a commercial gap analysis, and extensive stakeholder engagement via direct interviews, a random sample business survey (triage-style), and a series of workshops.

The results of *Growing Our Economic Future* have positioned each community and the collective region for success, via explicit strategic objectives that are fitting for each circumstance, and clear, actionable goals to move objectives forward. Also clearly articulated in the strategy, is the role that each municipality, as well as the roles that are to be played by various partners. The implementation plan also establishes a timeframe for rolling-out each strategy, signalling when each action needs to occur, while also identifying the relevant performance measures to understanding if activities are proving successful.

Contact: Ben Young, Economic Development Officer, Town of Taber (and staff liaison to the TRJEDC), (403) 223-5500 x5514, Ben.Young@taber.ca






Appendix A – Triage BR+E



TRIAGE BR + E: TAKE THE PULSE OF YOUR LOCAL BUSINESSES


MDB INSIGHT OFFERS A NEW WAY TO BETTER PREDICT FUTURE BUSINESS OPPORTUNITIES AND CHALLENGES.




Attracting and retaining businesses takes significant resources. You need to maximize the limited time and money your team has to execute these programs.




The statistically significant data generated by Triage BR+E is more accurate and timely than traditional methods. With precise, real-time insight you can be more nimble in responding to challenges and opportunities faced by local businesses.



Our affordable solution frees up your resources so you can proactively reach out to businesses with the most critical needs.



No other technique can start conversations with a broader cross-section of your business owners. Engage people you have never engaged before.



Our solution provides you with a list of practical priorities you can act on. The data gathered provides a benchmark against which you can measure your progress towards meeting your BR+E goals.





AN AGILE BR+E SOLUTION FOR AN EVOLVING ECONOMY: GET AHEAD OF BUSINESS CHALLENGES AND OPPORTUNITIES

One of the cornerstones of economic development is business retention and expansion. Nurturing the growth of local businesses can create jobs, add to the tax base, and foster healthy communities more quickly than investment attraction activities.

In practice, attracting and retaining businesses is often a grueling task. Limited time, staff, and financial resources create major barriers for economic developers. Establishing an effective BR+E program requires a sound understanding of best practices. Maintaining a traditional BR+E program requires a substantial investment of time and money.

Uncover and predict issues in your business community.

Our Triage BR+E solution overcomes these challenges by expanding beyond traditional approaches to provide precise, statistically significant, and unbiased information about local businesses in a timeline of weeks rather than months. This information measures the health of businesses in the present and helps to predict challenges and opportunities on the horizon.

Support your priorities with quantitative evidence.

For decades, the private sector has used derived importance to establish customer priorities. Through Triage BR+E, this technique is now available to economic developers. Based on the degree of importance business owners (your customers) place on local issues, you will gain a deeper understanding of how the community can foster local business growth.

Maximize your time and financial resources.

Triage BR+E relieves pressure on your resources by directing your focus to the businesses with the most pressing challenges and opportunities. This means you can quickly and proactively mitigate pending negative change or encourage business growth that will retain and create revenue and jobs.

Equipped with this information, you can connect with the local businesses most in need of assistance, building stronger relationships with them and supporting local economic growth.

Paul Blais, Executive Vice-President, has more than 20 years of BR+E experience as a municipal economic developer and consultant. Whether you are looking for ways to improve your current BR+E program or you are wanting to start one up for the first time, contact Paul to get more details on how Triage BR+E can be a fit.

pblais@mdbinsight.com | 1.855.367.3535 ext. 241



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Appendix B - Team Résumés

Paul Blais

MA, Ec.D., CEcD

Paul joined MDB Insight in 2007 as a founding partner and is Executive Vice-President at the firm. This followed a 10-year career in municipal economic development.

Highlighted Consulting Experience

- Triage BR+E Projects with, for example, Kingston Economic Development, Peterborough and the Kawarthas Economic Development, Municipality of South Dundas, Big Lakes County, Grande Prairie County, City of Kimberley, Lethbridge County, Town of Morinville, Lethbridge County
- Business Retention & Expansion Strategic Plans for Town of Georgina, Township of Brock, Town of Cobourg and County of Frontenac
- County of Middlesex Corporate Visitation Project, Data Analysis & Website
- Durham Region Federation of Agriculture Business Retention & Expansion Visitation Project and Analysis
- Regional Municipality of Wood Buffalo Corporate Visitation Pilot Project
- Economic Development Strategies for North Glengarry, North Stormont, South Stormont, and North Dundas
- Town of Petawawa Economic Action Strategy
- City of Pembroke Competitive Advantages Study
- Town of Gananoque Business Incubator Business Plan
- City of Ottawa *Taking the Lead!* Economic Development Strategy
- Township of Laurentian Valley Municipal Strategy: 2010-2014
- Eastern Ontario Trails Alliance 10-Year Strategic Plan and Business Plan
- Township of Madawaska Valley Economic Development Strategy & Corporate Strategy

Professional Experience

P.E. Blais & Associates: Principal, (2005-2007)

Kingston Economic Development Corp.: Director of Business Attraction and Retention (2004-2005)

County of Lennox and Addington: Manager, Economic Development (1998-2004)

Education

Wilfrid Laurier University/University of Waterloo: MA (1995)

Wilfrid Laurier University: BA (1993)

Economic Developers Association of Canada: Certification in Economic Development

International Economic Development Council: Certified Economic Developer

Professional Involvement

International Economic Development Council: Member (2009-Present)

Economic Developers Association of Canada: Member (1997-Present)

Economic Developers Council of Ontario: Member (1995-Present), Director (2008-2009)

Ontario East Economic Development: Commission: Member (1996-Present)

Economic Developers Alberta: Member (2009-Present)

Natasha Gaudio

MES

Since joining MDB Insight in 2018, Natasha has been involved in completing comprehensive background reviews and qualitative and quantitative assessments for a diverse range of communities and organizations. With a multidisciplinary background in Environmental Studies (Business and the Environment), Canadian Studies and Urban Studies, she brings a unique perspective to her project contributions.

Recent Experience

- City of Dryden 5-Year Strategic Plan
- Greater Moncton Regional Workforce Development Strategy
- Economic Development Strategy for the Superior East Region
- City of Waterloo Economic Development Strategy
- Industrial Lands Strategy for Black River-Matheson
- Regional Economic Development Strategy for Taber, Alberta
- City of Port Alberni and Alberni-Clayoquot Regional District Industrial Land Inventory and Action Plan
- Peterborough & the Kawarthas Economic Development Transition Strategy
- Economic Development & Tourism Strategy for Havelock-Belmont-Methuen
- City of Brockville 5-Year Tourism Strategy
- Cobourg Culture Master Plan
- City of Waterloo Corporate Strategic Plan 2019-2022
- Management of a marketing alliance with 30 local businesses
- Tourism strategy development, implementation and evaluation (Northwestern Ontario)
- Medicinal Plants Commercial Opportunity Analysis: Rainy River District (ON) 2018
- Ontario's Craft Beer Industry: Current Assessment and Future Directions

Professional Experience

MDB Insight

Research Analyst

2018-Present

Rainy River Future Development Corporation

Economic Development Coordinator

2017- 2018

Professional Skills Development Institute

Research Associate

May 2016 - Dec 2016

Education

York University: Masters in Environmental Studies, Business and the Environment (2016)

University of Toronto: BA (Hons) Urban Studies; Canadian Studies (2011)

Professional Affiliations

Economic Developers Council of Ontario: Member

Justin Dias

BA

Justin is a Research Analyst at MDB Insight and has spent the last six years working in the economic development sphere. His most recent experience before joining MDB Insight was as Director of Economic Development and Community Services with the Municipality of North Middlesex where Justin was responsible for business retention and expansion activities, conducting FDI attraction, and leading community development initiatives that brought together local industry, education and residents to leverage community assets and increase economic impacts.

Underlying Justin's economic development experience is his strong grounding in economic data analysis. Justin has contributed to publications on workforce trends and issues as well as working extensively with stakeholders to understand and design practical solutions for workforce challenges across a variety of sectors. Through his work with the Elgin Middlesex Oxford Workforce Planning Board, Justin contributed to the development of web portals, market reports and other comprehensive tools that brought together labour market information, job demand and employer resources.

Highlighted Project Experience

- Town of Strathmore Triage BR+E
- City of Kingston Tourism Sector Triage BR+E
- Town of Shelburne CIP Marketing Strategy
- Huron Shores Intercommunity Transit Initiative
- Elgin County Business Retention and Expansion Re-visitation
- Elgincincentives Community Improvement Plan Implementation
- Worktrends.ca Labour Market Information Website Launch
- Elgin-St. Thomas Workforce Committee Strategy
- Middlesex County Resident Life Survey
- Middlesex County Agri-Business Innovation Tours
- Elgin County Business Ambassador Program
- Elgin Middlesex Oxford EmployerOne Survey
- Manufacturing in the London Economic Region Research Study
- Elgin Middlesex Oxford Economic Region Labour Market Update
- North Middlesex Downtown Façade Improvement Program

Professional Experience

MDB Insight

Research Analyst 2019-Current

Municipality of North Middlesex

Director, Economic Development and Community Services 2016-2019

Elgin County

Economic Development Coordinator 2015-2016

Workforce Planning Board

Community Coordinator 2013-2015

Education

University of Waterloo: Economic Development Program (2017-2018)

Humber College: Graduate Certificate in Public Administration (2013)

Western University: BA in History and English (2007)

Professional Involvement

Economic Development Association of Canada

Member (2015-present)

Economic Developer Council of Ontario

Member (2015-present)

Project Management Institute

Member (2018-present)