

Canada-Alberta
Western Economic Partnership Agreement (WEPA)
PROJECT PROPOSAL SUBMISSION GUIDELINES

The Government of Canada and the Government of Alberta have entered into a new four-year Western Economic Partnership Agreement (WEPA). This joint agreement will contribute to sustainable and diversified growth of the Alberta economy through federal/provincial cooperation. Two priority areas have been identified: **innovation and value-added industries** and **regional economic development and sustainable communities** (refer Appendix A). The Governments of Canada and Alberta will each commit \$25 million towards cost-shared initiatives that promote these priorities.

Applicants

Applicants must be a legal entity and would normally include, but are not restricted to:

- a) non-profit organizations;
- b) post-secondary institutions, hospitals or regional health care centres engaged in research; or,
- c) other provincial agencies or legal entities created by the provincial government in circumstances where these organizations are in the best position to deliver projects.

Procedure

All applicants must submit a project proposal (refer Appendix B)

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in printed and electronic format by Friday, June 4, 2004. Anyone who applied to either the Province of Alberta or WD for potential funding under WEPA prior to April 27, 2004 are requested to re-apply.

If the project meets the guidelines and funds are available, the applicant may be requested to submit additional information.

Eligible Projects

Project proposals must clearly outline how desired outcomes will be achieved in one or both of the priority areas identified for this agreement (refer Appendix A). Eligible projects must demonstrate:

- (a) potential significant measurable impact on economic development in a particular community (i.e. geographic or area of interest);
- (b) environmental and economic sustainability;
- (c) start-up and long-term self-sufficiency;
- (d) consistency with obligations and policies related to international and domestic trade agreements;
- (e) objectives, expected results, and outcomes that incorporate clear performance measurements.

Eligible Project Costs

Eligible project costs may include public physical capital infrastructure, research and development, commercialization of technology (including testing in real environments), feasibility studies, human resource and advanced skills development, and operational funding. Eligible costs must be incurred between August 13, 2003 and September 30, 2009. Land and share purchases are **not** eligible for funding.

Funding Support

Federal funds for the program will be offered from Western Economic Diversification. Provincially, funds may come from existing provincial department budgets. Applicants should discuss their proposed projects with departments before submitting an application. Where possible, a letter of support for provincial funding should be attached.

APPENDIX A: WEPA PRIORITY AREAS

Project proposals must demonstrate how the initiative will achieve one or more outcomes in the following priority areas:

Innovation and Value-Added Industries:

- Increased value-added for traditional resource industries and increased economic activity for other sectors of regional strength
- Increased rate of technology commercialization and adoption in Alberta
- Supports for technology commercialization, manufacturing, and regional development
- Research and industry specific infrastructure in place to benefit existing and new, emerging industries at large
- Increased private and public sector investment in research and development
- A recognized world leader in identified key business clusters (e.g. wireless technology)
- Decreased dependence on traditional markets and industries
- Maximized use of broadband technologies

Regional Economic Development and Sustainable Communities:

- Increased Aboriginal participation in the Alberta economy
- Greater leveraging of non-government sources of funding for economic development initiatives
- Alberta as a world recognized progressive region in developing sustainable communities
- Skilled and entrepreneurial workforce that is able to respond to the demands of the increasingly innovation-based economy
- Increased foreign investment in Alberta
- Increased competitiveness of Alberta-based businesses

APPENDIX B: PROJECT PROPOSAL GUIDELINES

BASIC INFORMATION

- **Legal** or Registered Name, date and place of registration/incorporation.
- **Contact:** Address, phone, fax, e-mail, web site, contact person & position.
- **Project Location**
- **Nature of Entity** - Describe overall purpose/objectives and general activities. Where the entity is part of a larger organization, such as a university, the description should focus on the relevant department, group, etc. Non-profit associations should describe the type and number of members.
- Describe how the entity is **directed and managed**, including: directorship structure and membership, senior management structure and names/positions, with reference to overall and day-to-day management of the entity.
- **History** of the entity, including: core business and any similar projects undertaken, normal sources of funding for operations and special projects, Federal and/or Provincial government assistance received to date, and related partnerships.
Provide the latest annual report and a business plan (if appropriate).
- Provide details of any **arrears of repayment for amounts owed to the Federal and/or Provincial government** or provide a statement advising that there are no arrears on any amounts owed to the Federal and/or Provincial government.
- Latest externally prepared **Financial Statements** – if not provided, explain why e.g. well-known public entity.

PROJECT INFORMATION

Project Description

Briefly outline objectives, “what will be done”, and where it will be carried out & where it will have impact. Provide any necessary background information to better understand the project, including work done to date. Please provide details on the elements and methodology of the project (i.e.: undertake a survey, analyze results, make recommendations, communicate to stakeholders, develop an action plan for implementation, secure funding, implement recommendations).

Statement of Work

Describe key project components, list and describe project milestones, and, implementation plan. Describe potential cost and/or funding limitations, and potential risks that may impact on the proposed project.

Management Structure

How will this project be managed?

Project Timeline

Planned Project Commencement and Completion Dates, including critical factors in the proposed scheduling. Is there a risk that the opportunity will diminish or disappear if the initiative does not proceed under the timeframe of the current WEPA agreement?

WEPA Priorities

Please demonstrate how the project meets the priorities of the WEPA (refer Appendix A)

Other Participants

List all government departments, non-government organizations and private sector entities that are involved in the development and implementation of the project. If applicable, to what extent does the initiative support a cross-ministry or cross-departmental initiative?

Key Benefits And Outcomes

- Who are the key beneficiaries/customers of the project or task? How will this project meet client needs, bring value and enhance service to clients?
- What are the anticipated economic outcomes/results/benefits of the project (i.e. job creation, increase in investment, etc.) for Canada and Alberta?
- How does the project fit within the context of similar or related initiatives in Alberta or elsewhere? How will the proposed project be distinct and/or complement other initiatives underway?
- Describe how the project fits your organization's business plan, your business goals and strategic direction?
- Describe how the project fits the strategic direction of the federal and provincial governments?

Project Budget

Identify budget items as capital or non-capital, in-kind (assumed as cash otherwise) and secured or expected. In-kind contributions should be substantiated with an explanation. List all of the following items:

- Sources and Applications of Project Funding over the course of the proposed project (this should include the current status of funding from all sources)
- Breakdown of overall/total project costs (consistent with the Statement of Work)

- Projected Annualized Cash Flow (source and use) with a March 31 year-end
- Funding Sources: indicate planned and status of client, private sector commitments and public sector support (i.e. WEPA, other departments, agencies or levels of government) indicating nature and level of support.

Revenue Stream

Outline anticipated revenues directly generated with project. Where a commercial outcome is expected following the project, outline the proposed approach (new start-up, licensing, sale of product by the applicant, etc.), the potential market and potential revenues.

Performance Measurement

Please identify how the project's performance will be measured and what critical success factors will be used. Also, identify specific indicators of success for some time interval following project completion (if outcomes are expected following the project).

Environmental Impacts.

Describe all environmental impacts. An environmental screening **must** be completed for all projects and if there are potential environmental issues, a review under the Canadian Environmental Assessment Act.

Post-Project Ownership And Exit Plan

Please provide information on how the project will end and/or will be self-sustaining following the period for which WEPA funding is requested. Provide the proposed plan for ownership and responsibility of the operations, maintenance and assets of the project after completion, including the handling of any intellectual property (IP) that results from the project. Please indicate whether the revenue accruing from the project, if any, is to be shared by the parties, and in what proportion? Will the benefits of the project be ongoing once the project is completed?

Risks

Please identify any risks the initiative may face or produce and how the risks of proceeding may be mitigated or managed.