

Proposal and Final Report Content Guides

The following outlines the type of information that could be useful for proposals and final report submitted to the Canada Atlantic Provinces Agreement on International Business Development (IBDA). Please note that any additional information is encouraged since every aspect of every potential project could not be addressed under these guides. A template with the following information is available electronically.

Note 1: An application form must be signed and dated by an authorized official and attached to your proposal before being forwarded for consideration by the IBDA Management Committee.

Note 2: Provide your proposal and final report electronically in Microsoft Word.

Note 3: Should additional information be requested after a proposal has been submitted, the applicant will be asked to submit an Addendum to the proposal rather than a revised proposal.

Note 4: A final report is required before final payment can be processed.

Proposal Content Guide

1.0 Executive Summary

Summarize your proposal, providing the most pertinent information. This should include, but **should not be limited to**, a brief introduction of the project, the overall goal, major highlights, planned activities, expected results, and benefits to Atlantic Canada.

2.0 Introduction

2.1 Description of Applicant:

Short description (omit if government department) and list the names of the Atlantic sector working group members, their departments/provinces who participated in the development of this project.

2.2 Background of Initiative:

Provide a brief history of the project and its significance to the sector. Other items that should be addressed in this section include:

- If a **training and awareness activity**: Is this industry-led? Is this part of the sector's existing Atlantic strategy? Relevance to future sector activities. Level of interest from industry. If a repeat activity, provide relevant statistics of past Atlantic participation; other incoming/outgoing

activities that could impact in the recruitment or success of the initiative. Examples of activities could include, but are not limited to: one-on-one approach; recruiting more new exporters for activities; just-in-time training; awareness/information sessions; awareness campaign for potential exporters; mentorship; etc.

- If a **market and intelligence activity**: Is this industry-led? Is this part of the overall sector strategy? Relevance to the sector and its future activities? What will be the use of and how will the information be distributed? Examples of activities could include, but are not limited to: Atlantic capability profile; market research using in-market experts, Canadian Posts abroad and/or International Trade Canada; etc.
- If a **planning and research activity**: Is this industry-led? What impact will this have on the sector? What are the next steps? What will be the use of and how will the information be distributed? Examples of activities could include, but are not limited to: sector strategies; cross-sector projects; training and preparation needs; etc.
- If an **international business development activity**: Why this selected market? Is this part of an existing Atlantic sector strategy? Is there demonstrated industry support for the activity? What is the level of interest from potential participants? If this is a repeat activity, provide relevant statistics of previous Atlantic participation. Are there other incoming/outgoing activities that could impact the recruitment and success of this project? Examples of activities could include, but are not limited to: strategic trade shows; incoming buyer's missions; export-ready company activities; "out of the box" models.

3.0 Description of Initiative

Provide details, outlining all activities. Ensure eligible line items (costs) from your budget are described in this section (a heading and short paragraph for each item is suggested). The following topics should be addressed, although the description should **not be limited** to this list.

- If identified as a **training and awareness activity**, provide: date, location(s), target audience from each province (exporters¹, export-ready/non-exporters¹), recruitment strategy, association/government participation, speakers/trainers, post-activity follow-up¹, associations participation/role, communications, promotional/marketing activities, etc.

¹ Needs to be addressed even if no activities are planned

- If identified as an *international business development* activity, provide: date, location, agenda/program, target audience from each province (exporters, export-ready/non-exporters¹, recruitment strategy, speakers, value-added activities (training¹, matchmaking (number of meetings planned)), post-activity follow-up¹, Atlantic reception, on-site visits, other), expected level of participation, association/government participation, activities for non-exporters¹, etc.

4.0 Timeline

- What is the start date of the initiative? When do you expect to complete the project (e.g. when are invoices in, report due)? In addition,
- if this is a *training and awareness* or an *international business development* activity, what is the “Go/No go” date of your initiative should you reach/not reach your participation numbers?
- if this is a trade show, is a retainer required for the booth? If so, by what date?
- if this is a *market information and intelligence* or a *planning and research* activity, what are the key milestones?
- other key dates?

5.0 Objective(s)

Select one or more of the following, modify as appropriate, and/or provide one of your own:

- Increase sales of Atlantic Canadian products and services in a specific market
- Help diversify the markets of current exporters
- Increase the number of new exporters in a particular sector and/or market
- Increase the number of export-ready companies
- Enhance the presence of Atlantic Canada as a region at a particular event
- Assess and develop sales, marketing and investment opportunities for Atlantic Canadian companies in a particular market
- Assist in the development of strategic alliances through the provision of networking opportunities for project participants
- Increase the export knowledge of Atlantic companies through education and training
- Increase the overall value/volume of exports from the region
- Identify qualified leads for Atlantic Canadian companies
- Facilitate networking among companies, exhibitors and buyers through a structured matchmaking program
- Assist Atlantic Canadian companies to identify representatives or distributors
- Educate buyers as to the diversity, quality, value and accessibility of Atlantic Canadian products and services
- Increase the knowledge of Atlantic Canadian companies on opportunities that exist in a particular international market
- Develop a more focussed approach to exporting for the sector/market
- Assess the export capabilities of Atlantic Canadian companies
- Other

6.0 Communications

Identify possible communications opportunities, including news releases, announcements, speaking engagements and opportunities to profile federal and/or provincial elected representatives, products (e.g. brochures, recruitment ads) that will be developed and detail how they will be used. Any news releases must be coordinated with your communications officer.

7.0 Financial Information

Provide a detailed budget in Canadian dollars (**please refer to the funding guidelines for more detail**). Ensure that at a minimum, each eligible cost is described in section 3.0 of your proposal. List any and all sources of funding and the amount of funding that will be provided from each source. See trade show sample budget below as a guide:

Budget Sample

Eligible Costs		Funding Sources	
Trade show floor space	\$0	IBDA	\$0
Trade show pavilion	0	Participant costs	0
Matchmaking	0	Participant fees	0
Atlantic Canada reception	0	Other sources of funding	0
Other eligible costs	0		
Total Eligible Costs	\$0		

Non-Eligible Costs

Air Travel	\$0
Hotel	0
Meals	0
Shipping	0
Company samples	0
Company brochures	0
Other non-eligible costs	0
Total Non-eligible Costs	\$0

Total Project Costs	\$0	Total Funding Sources	\$0
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8.0 Deliverable

A final report will need to be presented at the conclusion of your project. Please refer to the “Final Report Content Guide” attached to this document as you may be required to gather key information during the planning stage as well as during the activity.

9.0 Consultation with Stakeholders

- Provide the names, titles and contact information of individuals who were consulted for this proposal (i.e. federal, provincial partners, industry associations, other organizations) and attach their written comments for the project (include as an appendix).

¹ Needs to be addressed even if no activities are planned

- If this is an *international business development* activity to be held abroad, provide the coordinates and written support of the country's Canadian Embassy, Consulate or High Commission.

10.0 Appendices

Any additional documentation that might be helpful to better understand your project (e.g. biographies of potential consultants or project team, reports, trade show information, marketing materials, agendas and itineraries, or pictures of previous events).

Final Report Content Guide

The following outlines the type of information that could be useful for project reports submitted to the IBDA. Please note that any additional information is encouraged since this guide cannot address every aspect of every project. You may want to consider providing participants with an exit survey to gather the information you will require.

1.0 Executive Summary

Provide a short summary of the project, describing the project highlights. This could include, but **should not be limited to**, a brief background and significance of the project, key highlights and relevant statistics, why the project succeeded/did not succeed, companies'/ stakeholders' overall feedback, etc.

2.0 Results

- 2.1 Objectives attained:** Review the objectives identified in your proposal and describe how they were attained.
- 2.2 Activities:** Describe the activities of the event, from the seminars, matchmaking¹, training², post-event activities (exit surveys with participants, stakeholders, etc.), reception/ networking, company comment, communications, etc.
- 2.3 Success stories:** Describe the highlights of the activities and success in terms of sales, partnerships, future contracts, presentations, meetings, etc.
- 2.4 Challenges:** Describe some of the challenges in planning this event, vis-à-vis recruitment, finances, preparedness of participants, organisation of the event, on-site logistics, etc. Was this the best venue for this sector, the best market for your participants?
- 2.5 List of participants:** Provide a complete list of participants (i.e. company, government or association) with their coordinates - name of participants, address, telephone and fax numbers, and e-mail addresses. Identify if a company is an active exporter, potential exporter or non-exporter. If this was a trade show, who exhibited and participated in the matchmaking.

- 2.6 Sales results:** Identify immediate and long-term results by province. Provide a summary of the exit survey results (i.e. immediate sales, projected sales in two years, number of leads/contacts, number of new customers reported, number of new agents, distributors, and brokers, etc.). Was this a new market for the company? Was this a market that the company pursued?

3.0 Budget

- 3.1 Proposed:** Provide a copy of the budget included in your proposal and subsequently approved by the IBDA Management Committee.
- 3.2 Actual:** Outline the actual budget for the project. What were the contributions received from companies, other government organizations, associations, sponsors, etc.? Did the project come in under budget? Were the organizers pleased with how the budget was used? Were there costs incurred that were not anticipated in the planning of the project?

4.0 Lessons Learned

- What were the objectives of the project? How was the project evaluated (e.g. exit surveys, interviews with participants)?
- Were companies satisfied with the overall project? Did companies report any other positive outcomes (e.g. gaining information from their competition on the market, meeting new and existing customers)? Was follow-up mentioned? If so, how?
- Why did the project succeed or fail? Were organizers pleased with the results of the event?
- Is this a project that would merit being repeated, within another sector or in another market? What would you do differently if you had the chance?

¹ *Matchmaking:* Provide a brief description of the matchmaking activities, the consultant used, the amount spent, and the benefits received, and identify how many Atlantic companies received the services of the matchmaker, how many one-on-one meetings were held by companies. Attach the matchmaker's report as an appendix, if possible. If matchmaking was planned but did not materialize, explain why.

² *Training:* Was training incorporated into your project (e.g. seminars, information sessions, one-on-one meetings, educational packages)? Describe. Was it aimed toward new or experienced exporters, or both? Was any feedback received from companies on the value of the training? If training was planned but did not materialize, explain why.

5.0 Post-activity Follow-up

What are the plans to follow up on this project? Will a follow-up with the company be done in the foreseeable future? If so, how? If not, why not?

6.0 Conclusion

What are the benefits of participating in this type of event, for individual companies and the Atlantic region as a whole? Does this event warrant future Atlantic participation? How does this event fit in with the sector's overall strategic plan? Were there lessons learned for future projects?

7.0 Appendices

Provide additional documentation that might be helpful in reporting on the results of the project (e.g. matchmaker report, trade show guide, marketing materials developed for the event, agendas and itineraries, pictures, copy of all business cards collected or information on all contacts/leads made, and survey forms and results).