



CANADIAN GAMING ASSOCIATION

Economic Impact Assessment of the Canadian Gaming Industry

Terms of Reference

Background

Gaming is a significant economic sector in Canada. Gaming not only generates substantial revenues for governments and charities but also employs thousands of people and purchases hundreds of millions of dollars in goods and services annually from Canadian manufacturers and service providers.

The Canadian Gaming Association (CGA) wishes to engage a consultant to research, collate and document the economic impacts from all elements of the Canadian gaming industry. The primary purpose of this research and analysis is to provide reliable, factual and unbiased information about the social and economic impacts of legalized gaming in Canada based upon the actual results reflected in independently derived statistical data.

For the purposes of this engagement, the Gaming Industry is defined as the legal operation of bingo, casino, EGD, lottery, charity (e.g., pull tabs) and pari-mutuel gaming activities. Gaming activities are provided across Canada through a combination of government entities (including First Nation governments), charities and private operators.

Specifically, the CGA's objectives with regard to this research are to:

- Quantify the economic effects associated with Canadian gaming activities with a particular focus on:
 - Employment
 - Revenues generated for governments (at the provincial and federal levels)
 - Value added
- Provide more detailed analysis at the provincial level as well as within gaming sectors (e.g., casino, lottery).
- Detail in narrative form, using a range of case studies, the economic effects associated with gaming and relate these effects to the community in which the gaming product is located. The purpose of this objective is to demonstrate the breadth and depth of gaming in various communities across Canada.

The outputs should lend themselves to future updates and modifications as the nature, scale and operating parameters of the gaming industry evolve over time.

Given the intended use of the information, the CGA wishes to engage an independent consultant experienced in such analysis, including an understanding of the gaming entertainment industry.



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Scope of work and Deliverables

The selected consultant will be expected to:

- Work with the CGA to refine the work program, prioritize objectives and determine appropriate deliverables in light of project budget and information (e.g. availability) constraints.
- Collect, assemble, analyze and interpret verifiable source data on Canadian gaming. Data will be collected and structured in a manner that facilitates future updating.
- Identify, collect and analyze economic impact analyses at the geographic and sectoral level from international jurisdictions and relate these findings, as appropriate, to Canada.
- Select, with input from the project Steering Committee, several case studies where detailed examination of the economic impacts of gaming can be detailed (quantitatively and qualitatively) at the community level.
- Select an appropriate economic impact modeling “tool” suitable for generating employment, government revenue and value added outputs at the provincial level.
- Assemble appropriate inputs from the data collected and using the selected tool generate economic impact outputs
- Document the findings in a written report.

Consultants are free to make suggest modifications and/or additions to these work steps.

Proposal Submission

Six (6) copies of the proposal are due at the offices of the Canadian Gaming Association by 12:00 noon, EST, Thursday November 23, 2006.

Each proposal should contain:

- A summary of the stated objectives and demonstration of a clear understanding of these objectives.
- A detailed work program specifying what, if any, assistance is required from the CGA.
- A summary of qualifications for the submitting organization and each member of the proposed team, identifying the role of each team member.
- A minimum of three references and a description, for each reference, of the relevant project/assignment for which the referee is provided.
- A timeline showing key milestone points
- A budget outlining professional fees and expenses to complete the assignment.

The proposal, excluding appendices (e.g., qualifications, resumes) should not exceed twenty-five (25) pages.



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Selection Process

Proposals will be evaluated by a committee of CGA Board and Management.

Proposals will be evaluated against the following criteria and relative weighting.

<u>Proposal Component</u>	<u>% Weighting</u>
Understanding of the assignment	30%
Demonstrated knowledge of the gaming industry	20%
Completeness of work plan	20%
Qualifications	20%
Budget	<u>10%</u>
Total	<u>100%</u>

Project Management

The project will be managed by a Project Steering Committee comprised of Bill Rutsey and Paul Burns for CGA and the primary or lead consultant for the successful proponent.

Day-to-day management and liaison throughout the assignment will be provided through Paul Burns at the CGA offices.

Timing

The successful consultant will be selected and notified by December 8, 2006. The assignment is expected to be completed by March 31, 2007.

Conflicts of Interest

All bidders are required to identify situations where, in their opinion, a conflict of interest may occur. Conflicts may include but not be limited to situations where ongoing statutory audit and advisory relationships exist with operators or regulators of entities involved in Canadian gaming. Also, relationships with industry associations including those representing manufacturers, distributors, addiction and counselling agencies and related organizations.

General

The CGA retains the right to select any proposal or to cancel the entire Request for Proposal.

No payment will be made to any consultant in connection with submitting their proposal.

Contact with members of the CGA Board or Executive is prohibited (except as noted herein) and may result in disqualification.



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Contact and additional information

Additional information may be obtained from and all questions regarding this Terms of Reference should be directed to:

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The Canadian Gaming Association reserves to right to advise all bidders of questions received and responses provided.