

DATA PLATFORM MODERNIZATION

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Responses Due: April 19th, 2023

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1. Introduction

Calgary Economic Development Ltd. (CED) invites qualified firms to submit a proposal for the **Data Platform Modernization** RFP. A proposal, in electronic form must be submitted via email as outlined in Section 19. The proposal should be sent to the attention of the Contracting Manager by email as noted in Section 19. Late proposals will not be accepted.

2. Timeline

RFP Posted/Released	March 20 th , 2023
Deadline for Questions	April 12 th , 2023 – 17:00 MST
Proposal Submission Deadline	April 19 th , 2023 – 17:00 MST
Meetings with Short-listed Vendors	April 26 th – May 5 th , 2023
Bid Notification	May 12 th , 2023
Anticipated Project Kick-Off	May 22 nd , 2023
Target MVP Delivery	September 29 th , 2023

Vendors are welcome to submit accelerated or more efficient timelines to complete the proposed work.

3. Definitions

“CED” means Calgary Economic Development Ltd.

“City of Calgary” refers to the municipal government of the City of Calgary.

“Request for Proposal” or “RFP” means this document including attached appendices.

“Contracting Manager” means the person identified in Section 15 of this RFP.

“Vendor” means an organization responding to this RFP.

“Proposal” means a Vendor's response to this RFP and includes all the Vendor's attachments and presentation materials.

“Services” means the duties, tasks, and responsibilities of the Vendor as described in this RFP.

“MVP” means Minimum Viable Product, as defined in Section 12 of this RFP.

“SaaS” means Software as a Service.

“PaaS” means Platform as a Service.

“ETL” means Extract, Transform and Load.

“ELT” means Extract, Load and Transform.

“AI” means Artificial Intelligence.

“ML” means Machine Learning.

“API” means Application Programming Interface.

“SSO” means Single Sign-on.

“AD” means Active Directory.

“CRM” means Customer Relationship Management and refers to software.

“BI” means Business Intelligence.

4. Standard Form Contract

By submitting a Proposal, a Vendor acknowledges it agrees that the terms and conditions of this RFP are incorporated by reference into its Proposal. If a Vendor's Proposal is accepted the Vendor will be expected to execute CED's standard contractor agreement. Vendors who are unwilling to abide by these standard terms and conditions should not submit a Proposal.

5. Vendor Questions

All questions regarding this RFP must be directed via **email** to the Contracting Manager listed in Section 15. Enquiries and responses may be recorded and may be distributed to all Vendors or posted on CED's website.

The Vendor must immediately notify the Contracting Manager in writing of any ambiguity, divergence, error, omission, oversight, or contradiction in this RFP discovered by the Vendor and request whatever clarification is required to prepare the Vendor's Proposal.

In order for CED to deal effectively with Vendor questions or concerns about any terms, conditions or requirements of this RFP, including the standard terms and conditions, such questions or concerns must be communicated in writing to the Contracting Manager in accordance with the Timeline indicated in Section 2 above. Questions received after this time will be answered if, in the opinion of CED, the circumstances warrant and time permits.

6. Conflict of Interest

Vendors must fully disclose, in writing, to the Contracting Manager on or before the Proposal Submission Date of this RFP, the circumstances of any possible conflict of interest or what could be perceived as a possible conflict of interest then known to Vendor between the Vendor and CED and/or the Selection Committee. CED may reject any Proposal where, in the opinion of CED, the Vendor is or could be perceived to be in a conflict of interest.

7. Vendor Expenses

The Vendor is responsible for all costs of preparing and presenting its Proposal.

8. Confidentiality

All information provided by or obtained from CED in any form in connection with this RFP either before or after the issuance of this RFP, including any confidential information is the sole property of CED and must be treated as confidential; is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract; must not be disclosed without prior written authorization from CED; and must be returned by the Vendor to CED, or destroyed if held in electronic format, immediately upon the request of CED.

9. Background and Current Challenges

CED leverages vast amounts of data every day to assist with community engagement, economic intelligence and business development activities. Today, data from internal and external sources is stored in a variety of locations, is manually collected, and is visualized using tools such as Microsoft Excel and PowerPoint. While SharePoint has enabled improved sharing of information and data in the organization, it can still be difficult and time-consuming for users to find what they need and be sure that they're working with the latest dataset and available information. Often, an added step of validating accuracy and sources with the data owner is required. Data is frequently shared externally with community stakeholders and businesses, which enhances the criticality of both timely access and accuracy of the insights provided.

Data sources currently include, but are not limited to, internally generated data, externally provided data (from business and community etc.), third party data from paid and public sources, plus reports, news articles, websites and studies. Types of data include structured, semi-structured and unstructured sources (quantitative and qualitative). Most data sources can be batch updated, with limited, but possibly some future requirements for streaming data. Example sources can be found in the Appendix.

Our vision is to modernize how data is leveraged at CED and to improve automation, efficiency, reliability, governance and analytical capabilities throughout the organization. In 2023, we envision the implementation of foundational cloud architecture components so that the organization has the capacity to store data in a single repository, has tools for ETL/ELT and can process, prepare and integrate data to create advanced visualizations/reports that can be self-served and customized based on user needs. Ultimately, the initial platform should elevate how CED collects, analyzes, maintains and shares information both internally and externally. This initial implementation will herein be referred to as the “MVP” (Minimum Viable Product).

10. Purpose of the Project

Overall, CED is seeking expertise in data management modernization to develop a target architecture, operational strategy, and implementation plan to achieve objectives outlined in Section 11. This plan should consider possible technologies, automation opportunities, human capacities and overall governance that align with the following key purposes for the project:

Modernize



Implement a modern cloud data architecture that improves automation, storage and processing of data to ultimately unlock additional insights via robust analytics and manipulation tools. Build a single, trusted repository for all types of data used by CED, including solutions to clean, merge, process, and prepare data for consumption by BI tools. Implement new tools for dashboards and insight generation. Prepare for integrations and data extraction from other software used at CED, including CRM and project management.

Democratize



Enhance data availability and aptitude so that all members of the CED team feel comfortable self-serving data and/or having it delivered to them in the form of dashboards or information summaries. Ensure solutions are flexible and adaptable to departmental needs. Build confidence in skills and prepare team members with training to unlock full power of the implemented solutions.

11. Objectives of the Project

The following are based on CED's initial research and internal requirement gathering:

Data Management



Modernize CED's data management and analytics capabilities by implementing cloud-based solutions that collect, store, process and visualize all types of data used by CED teams. Improve governance, security, access, efficiency and overall structure of the organization's data. Convert raw data to useable insights.

Storage



Implement a cloud storage solution that allows CED to build a single repository/warehouse of data for structured, semi-structured and unstructured sources as described in Section 9 of this RFP.

Automation



Automate data collection through data pipelines, APIs and integrations. Enable/implement ETL/ELT mechanisms. Develop mechanisms that automate updates for newly acquired or updated data in reports and dashboards.

Prep & Process



Establish data preparation/integration capabilities for cleansing, processing, and normalizing data for consumption by analytics platforms and visualization tools.

Analytics/Reporting



Implement a tool that allows for dashboard creation, manipulation, enhanced discovery and visualization of CED's data. Goal is for self-serve access and customization options by trained CED team members.

12. MVP Phase and Initial Deliverable

CED endeavours to implement the first phase of a data platform by the end of calendar Q3 2023. In this phase, it is expected that CED will have implemented storage, ingestion, integration and processing tools, plus at least one analytics or visualization tool by September 29th, 2023. Select teams should benefit from automated data pipelines, API data ingestion, a single data repository, plus have access to platforms and tools that allow for data cleansing, normalization and preparation. The MVP phase will focus on structured and semi-structured data. Some

sources will have APIs available, while some data is housed in Excel spreadsheets. Exact deliverables will be discovered based on interviews with possible partners/vendors. Scope may change depending on timelines and additional components proposed by vendors during the RFP process. It is expected that data security and access controls is a focus area of any proposed solution.

13. Deliverables

CED has a bold end-state vision for the Data Modernization project but will first focus on establishing a plan for an initial architecture/platform (MVP) roll-out by the end of 2023, and ideally by the end of calendar Q3.

The vendor will work with CED to finalize the scope of the initial work, but the following are expected to be presented as part of the proposal:

- **Act as the Data Architect** to translate CED's business requirements into an appropriate data technology architecture:
 - Present recommendations on technologies, architecture, components, redundancies, and providers to implement initially, knowing that CED will take an iterative, modular approach to add additional capabilities beyond the MVP, as resources allow (financial and human).
 - Assist CED with initial data models, where applicable.
 - Make suggestions on technology roadmap to unlock further features such as AI and ML, plus integrations with existing CRM and project management software.
- **Build a strategy** to achieve successful data platform operations in 2023, based on MVP requirements and aligned with CED's vision and objectives:
 - Provide recommendations for governance, training, change management, data stewardship, data cataloguing and required roles to manage and maintain a robust data ecosystem.
- **Develop an implementation plan, plus coordinate and execute delivery** of initially agreed-up strategy, technologies and platform to achieve MVP.
- Where possible, include examples or references of past data modernization projects.

Any presentation of deliverables should be in electronic format and readable using common software and common formats such as Word, PowerPoint, Excel or PDF.

14. Fees and Payment Terms

CED expects vendors to price the work according to the MVP scope outlined in Section 12 and as competitively as possible. The maximum estimated budget for professional services inclusive of consulting on data architecture, operations strategy and the implementation portion of the work as outlined in Deliverables is \$100,000 CAD, with an understanding that additional SaaS and PaaS fees will apply based on the solution proposed by the vendor. When possible, estimates for the forementioned fees should be included as part of the RFP and will be factored into the overall evaluation criteria for vendor selection.

Alternatively, vendors are welcome to submit a variable or modular pricing structure for their services and it will be considered.

Please include any expected maintenance, upgrade or administration fees based on the proposed solution, when applicable. If available, CED is eligible for non-profit/public sector pricing.

Proposals must provide full pricing disclosure and include a breakdown of the Vendor's fees and disbursements to complete all deliverables outlined in Section 13 and achieve the objectives listed in Section 11. Please include the following with the breakdown of costs:

- Cost per deliverable, including consulting fees, implementation fees and technology/platform recommendation fee estimates (monthly, annual, variable or contract term, if applicable).
 - Scalable SaaS and PaaS fee flexibility based on usage and storage will be considered, as will fixed fee/usage/contract options.
 - Platform start-up, maintenance, upgrade and other admin costs.
- Prices must be stated in actual dollars and cents expressed in Canadian currency and inclusive of all taxes except for GST, which should be itemized separately.

Please provide options for the project team to reduce project costs and be prepared to consider which aspects of the proposal might be optional.

15. Contracting Manager

For the purposes of the provisions of information surrounding this contract or the administration of the contract, the Contracting Manager is:

Calgary Economic Development Ltd.
Attention: Tyler Spring - Director, Special Projects
500 Centre St S 32nd Floor
Calgary, AB T2G 1A6
Canada
Email: tspring@calgaryeconomicdevelopment.com

16. Evaluation Metrics and Criteria

CED will evaluate submissions based on the following criteria:

Criteria	Possible Points
Quality of Submission <ul style="list-style-type: none"> • Clear and concise • Quality of writing 	10
Team Competency, Capabilities and Background <ul style="list-style-type: none"> • Experience with data modernization projects • Relevancy of past projects (please provide examples where possible) • Ability to both strategize and implement/execute proposed solutions 	20
Recommendations and Proposal <ul style="list-style-type: none"> • Accurately addresses purpose, objectives and MVP scope • Provides clear and concise recommendations for technologies and platforms • Initial delivery within timelines outlined by CED for MVP • Clear timelines for project milestones • Solution is flexible, modular and SaaS/PaaS focused • Includes change management, continuity, operational and training considerations • Solution is expandable and scalable 	50
Fees <ul style="list-style-type: none"> • Fees have been clearly outlined and are competitive • Breakdown of fees and disbursements 	20
Total	100

17. Solution Preferences

The following are preferences that CED has for proposed solutions, but vendors are welcome to propose alternatives in their RFP submission:

Non-Proprietary



Solutions should be scalable and provide opportunity for integrations with other SaaS and PaaS providers. Single-provider solutions are acceptable as long as they support flexible options and integrate with a variety of other services.

Modular/Scalable



Solutions should allow for further add-ons and capabilities to be added at a later date, as resources allow. Examples could include unstructured data processing, AI and ML capabilities.

Integrations



Solutions should allow for API or other integrations with software such as CRM and project management tools.

SSO Integration



Solutions should allow for SSO and be integrated with CED's AD.

Continuity Focused



Solutions should limit the requirements for advanced coding and specialized roles. Suggestions for high-level roles/training that is required to build and maintain the data platform are welcome as part of the RFP process. CED has an eye to platform continuity should role turn-over occur and seeks to limit the need for specialized roles. Maximum automation opportunities should be considered as part of solution design and recommendation.

Cloud Focused



Solutions should focus on SaaS/PaaS cloud-based offerings and limit requirements for on-prem components.

18. Equity, Diversity and Inclusion (EDI)

Calgary Economic Development celebrates diversity and is committed to advancing Equity, Diversity and Inclusion (EDI). Through EDI, we create a path to success for all our employees, where they have equal opportunity for advancement, have the voice to contribute to our collective growth and development and work in an inclusive environment.

In alignment with our EDI guidelines, CED is also committed to maintaining a diverse supplier base and building relationships with vendors that reflect the market, clients and communities we serve.

As a possible vendor and partner of CED, we invite you to optionally include information and data about your organization's commitments to EDI as part of your submission.

19. Submission Information

Proposals must be received by **email** before **April 19th, 2023 at 17:00 MST** (per Section 2) to:

Attention: Tyler Spring
Email: tspring@calgaryeconomicdevelopment.com
Subject: RFP 2302-001 – Data Platform Modernization

- After the Proposal Submission Date, CED may post the identity and addresses of the Vendors.
- CED may elect to not consider any proposal that:
 - Is received after the exact time and date noted above.
 - Does not indicate the request for proposal's title, closing date and Vendor's name on the proposal in response to the RFP.
 - Is delivered to an address other than that provided above.
 - Transmitted proposals will be accepted if the proposal is received before the submission deadline to the email address provided above.

20. CED Reservation of Rights

CED reserves the right:

- To not consider, or to reject, any or all Proposals in whole or in part for any reason whatsoever in its sole and absolute discretion;

- To accept any proposal in whole or in part, even if it does not comply with the terms of this RFP or is not the highest rated proposal in accordance with the evaluation criteria;
- To short list Vendors, and require a presentation by the Vendors short-listed and/or the provision of additional information by such short-listed Vendors;
- To, at any time, add, delete or modify this RFP and to have the Vendors advise CED of the effect of such changes on their Proposal and/or have the Vendors resubmit their Proposals in light of same;
- To negotiate at any time with any one or more of the Vendors to the exclusion of the other Vendors; and
- To not proceed, for any reason, with this RFP or the project contemplated in this RFP.

21. Intellectual Property

Unless otherwise agreed and confirmed in writing:

- a) All material, including but not limited to programs, reports, notes, maps, drawings, photographs, data, forms and other records prepared, created, written or recorded by ("**IP**"): (a) the Vendor, or (b) CED or (c) the Vendor and CED jointly, in connection with the Services under any agreement incorporating the terms and conditions of this RFP, a proposal, or as a deliverable under any agreement arising therefrom (an "**Agreement**"), will be the property of CED; accordingly, the Vendor hereby assigns to CED all rights, title and interest it may have from time to time in such material and all intellectual property rights therein will vest in CED.
- b) During the term of the relevant Agreement, the Vendor shall have a non-exclusive, non-transferable license to use such IP of CED or IP which is jointly created for the sole purpose of providing and completing the Services. Upon the termination or completion of a specific project or Agreement, the Vendor will promptly return such material to CED whether completed or not. Notwithstanding the preceding sentence, the Vendor may retain for archival purposes a single copy of each item of such material; and
- c) Every invention, discovery or improvement developed by the Vendor in the course of, or in connection with, performing the Services under an Agreement where the invention, discovery or improvement has been initiated or directed or specifically requested by CED, will be the property of CED and, accordingly, the Vendor hereby assigns any intellectual property right to any such invention, discovery or improvement developed to CED. The Vendor will cooperate fully in the establishment and maintenance of all intellectual property rights accruing hereunder to CED. This provision will survive the termination of any

Agreement and to the extent necessary or desirable, the Vendor will take such actions as are reasonably requested by CED after termination of an Agreement with respect to intellectual property rights created during the term of the Agreement.

The parties acknowledge and confirm that any intellectual property that was developed prior to the relevant Agreement, or that was developed by the Vendor independently from such Agreement with CED, or that was developed at the sole initiative of the Vendor without any prior initiation or direction or request from CED, will be outside the scope of this Section 16.

If the Vendor needs access to data of CED in order to carry out Services under an Agreement incorporating the terms and conditions of this RFP, CED will grant a non-exclusive, non-assignable license to have access to and to use that data.

22. No Further Contract or Liability Arising from RFP Process

By submitting a Proposal, the Vendor agrees and acknowledges that:

- Nothing in this RFP nor the submission of the Proposal nor the review and consideration of the Proposal by CED nor any communication between the parties in relation to the RFP or the Proposal will operate to obligate any party to enter into any further business relationship with the other party and, in particular, if CED decides to engage the Vendor in connection with any Proposal or the subject matter of the RFP then such engagement may only occur pursuant to a written agreement that has been signed by both parties and, absent such written agreement, CED will have no further liability or obligation to the Vendor in connection with the subject matter of the RFP;
- The Vendor is participating in this RFP process at its sole risk and expense, and CED will not be liable to the Vendor for any costs, expenses or liabilities incurred by the Vendor in any way arising in connection with the Vendor's participation;
- CED has made no representations other than those expressly stated in this RFP;
- CED has the right to cancel this RFP at any time, CED may reissue this or a similar request for Proposal at any time, for any reason whatsoever or decide not to reissue it for any reason, without incurring any liability and no Vendor will have any claim against CED as a consequence; and
- The Proposal and any accompanying documentation submitted by the Vendor will become the property of CED and will not be returned.

23. Appendix

A. Example Data Sources

- Statistics Canada ([Example](#))
 - API Available ([More information](#))
- Conference Board of Canada
 - Batch XLS/CSV – must be downloaded
- Lightcast
 - API Available ([More information](#))
- CVCA
 - PDF reports ([Example](#))
- LinkedIn Talent Solutions
- Alberta Government – Open Data
- City of Calgary – Open Data
- Google Analytics

B. Frequently Asked Questions

What types of software and systems does CED utilize today?

- CED primarily uses Microsoft 365 for day-to-day operations.

Does CED have existing data architecture or infrastructure in place today?

- No, currently CED is leveraging SharePoint storage, plus the use of Excel and PowerPoint to support data-related activities.

Are there currently resources at CED with advanced coding and/or data skills?

- Yes, but limited, as such, CED is looking to reduce the requirement for advanced data knowledge, but it considering both upskilling and minimal hiring activity that may be required to support the successful implementation, operation and maintenance of a data platform.