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REQUEST FOR PROPOSAL (RFP):	21-723
TITLE OF RFP:	Data & Analytics Framework
ISSUE DATE OF RFP:	APRIL 1, 2021
RFP SUBMISSION DATE:	1:00 P.M. OTTAWA TIME, APRIL 26, 2021

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STRUCTURE OF THE RFP

This RFP document is structured in 5 Parts:

Part 1: Introduction.

Part 2: The RFP Process

(Includes explanation of the RFP process and Proposal requirements)

Part 3: Proposal Requirements (Mandatory and Rated)

Part 3 of this RFP contains the Mandatory Requirements which are identified by the word “must” or “shall” or “will” and/or followed by the symbol “(M)” and the Rated Requirements which are identified by the symbol “(R)”, the responses to which form the Proponent’s Proposal.

Part 4: Services and Deliverables

Part 4 of this RFP contains the Services and Deliverables that the Preferred Proponents must provide.

Part 5: Terms and Conditions

Pertaining to this RFP.

Note: Defined terms for this RFP and associated Appendices will be capitalized and found in Section 1.6.

1.	INTRODUCTION
1.1	EXPORT DEVELOPMENT CANADA
<p>For 75 years, Export Development Canada (“EDC”) has been dedicated to helping Canadian companies of all sizes succeed on the world stage. We are a financial Crown corporation that equips Canadian companies with the tools they need – the trade knowledge, financing solutions, equity, insurance, and connections – to grow their business with confidence. As international risk experts, we make trade safer for Canadian companies. Underlying all our support is a commitment to sustainable and responsible business.</p> <p>EDC’s Head Office is currently located at 150 Slater Street, Ottawa, Ontario, K1A 1K3.</p> <p>For additional information, please visit EDC’s website at edc.ca.</p>	

1.2	PURPOSE OF THE RFP
<p>EDC is undergoing a multi-year digital transformation, which includes investments in our people, processes, technology and data to enable a data driven culture. The program has been underway for 2 years and has established a new operating model and team, a new data platform, new reporting/analytics tools and the deployment of an information management policy. The program is evolving to meet EDC’s transformation to a digital organization and as such requires further investment in the following areas.</p> <ul style="list-style-type: none"> • People / culture: EDC has adopted a hub and spoke model to deliver data and analytics capability. It has spent considerable effort in establishing the hub roles and processes in addition to business accountabilities to support data and analytics. A foundational data literacy program has been delivered and will evolve across the organization; this will include establishment of role-based learning. The hub will also turn its focus to the reporting and analytics teams across EDC to ensure appropriate channels for engagement with the hub, transformation of their reporting and analytics capabilities and refined accountability. The ultimate outcome is to improve data literacy, adopt the use of AI, and ensure an appropriate operating model is deployed and functioning across EDC. • Process: EDC’s journey involves the design and evolution of processes associated to data governance, self-serve analytics, data access, data policies, data quality, metadata management, data integration, reporting, and master data. Capabilities in these areas have been in place, however are not scalable to the needs of a digital organization. The evolution of these capabilities involves refinement of the operating models and technology enablement to ensure scalability and consistency across the organization. • Technology: EDC is in the process of refreshing its data technology stack to ensure modern solutions that will meet the needs of the enterprise. An important investment was made in our data platform as a foundation to remove our dependency on legacy datamarts. This data platform is to be supported by adequate data lineage, data quality & master data capability. • Data: EDC has an evolving Enterprise Conceptual data model. This model is being refined and is informing the development of a standardized and curated data layer for the data platform in support of migrating from our data marts to the data platform. The data analysis work is extensive to complete this new standardized data model to be consumed by the enterprise for analytics, reporting and integration. The data quality efforts to date have been focused on critical areas, however the desired outcome is to ensure data quality is embedded in all data platform layers to move from a reactive to a proactive issue resolution. The identification of master data is also underway to ensure consistent definition and usage. <p>A critical component of this journey is EDC’s Data & Analytics Strategy which, when implemented, will enable data-driven decisions and customer innovation designed to increase Canada’s trade in the world.</p> <p>EDC is launching this Request for Proposal (“RFP”) process to select up to five (5) Preferred Proponents with whom EDC will enter into an agreement for consulting and system integration services related to its data and analytics needs.</p> <p>Proposals will be evaluated in accordance with the evaluation process set out in Part 2 of this RFP. Based on the evaluation of Proposals, selected Proponents will be invited to enter into a Master Framework Agreement (also referred to herein as the</p>	

“Agreement”) in the form set out in Appendix A, which will govern the potential subsequent provision of the Services and Deliverables.

Upon execution of the Master Framework Agreement, the Proponent will be included on the roster of Preferred Proponents (the “Qualified Supplier Roster”). The Master Framework Agreement will remain in effect until terminated by EDC or until such time as the Preferred Proponent is removed from the Qualified Supplier Roster.

During the term of the Master Framework Agreement, EDC may invite the Preferred Proponents to compete in invitational second-stage competitive processes (“Work Packages”) for discrete work assignments involving the provision of the Services and Deliverables. If selected to perform a work assignment, the Preferred Proponent will provide the Services and Deliverables in accordance with the general terms and conditions contained in the Master Framework Agreement and any specific terms and conditions included in the solicitation document for the Work Package (the “Work Package Request Form” a form of which is attached as Appendix B to the Agreement).

EDC may periodically require all Preferred Proponents on the Qualified Supplier Roster to provide documentation for reassessment of their qualifications. The reassessment will be based on the same requirements and evaluation process set out in this RFP. Preferred Proponents that do not continue to satisfy the qualification requirements set out in this RFP will be removed from the Qualified Supplier Roster.

Preferred Proponents that fail to perform contracts awarded through a Work Package in a satisfactory manner will be removed from the Qualified Supplier Roster. Preferred Proponents may also be removed from the Qualified Supplier Roster for reasons of conflict of interest or unethical conduct.

Preferred Proponents that are removed from the Qualified Supplier Roster will not be eligible to re-qualify for inclusion on the Qualified Supplier Roster for a period of three (3) years.

New Proponents will be permitted to apply for qualification and inclusion on the Qualified Supplier Roster at any time; however, EDC will consider new applications and refresh the Qualified Supplier Roster on an annual basis and will notify applicants of the outcome. Only one (1) new Proponent (i.e. the top scoring Proponent) will be added to the Qualified Supplier Roster each year through this process. The same qualification requirements, evaluation process and Master Framework Agreement that are set out in this RFP will apply to the ongoing application process.

A Proponent that applies for qualification and is not selected for inclusion on the Qualified Supplier Roster will not be permitted to reapply for a period of one (1) year.

Each Work Package will be allocated to a Preferred Proponent in accordance with the Work Package allocation process set out in Section 3 of the Agreement located in Appendix A.

1.2.1 PROPOSED SERVICES AND DELIVERABLES

EDC will allocate work to Preferred Proponents in three distinct service areas:

1. Services and Deliverables related to EDC’s data strategy & governance
2. Services and Deliverables related to EDC’s enterprise data platform
3. Services and Deliverables related to EDC’s data science (i.e. Business Intelligence, Advanced Analytics, Artificial Intelligence, Machine Learning, etc.)

Services and Deliverables have been categorized as primary and secondary for the respective Service Areas. Primary services are those that are core to the service areas whereas secondary services are related and support the core services. The following Services and Deliverables related to the service areas above may be included in the Work Package:

Services and Deliverables	Service Areas		
	Data Strategy & Governance	Enterprise Data Platform	Data Science

<p>Data & Analytics Governance Data analytics governance is a structure for making data-related decisions which defines roles/responsibilities, ownership / stewardship, and handles communication of data governance determinations. It defines data definitions / taxonomies, enterprise data models, data usage patterns, and Key Performance Indicators such as service levels, and cost of ownership.</p>	Secondary	Secondary	Secondary
<p>Data Architecture and/or Solution Architecture Data architecture describes the structure of an organization's data assets and data management services. It supports the data aspects of the application architecture and is supported by the data-centric nodes in the technology architecture.</p>	Secondary	Primary	
<p>Data Integration Data integration is the process of combining various types of data to provide a unified set of information.</p>		Primary	
<p>Data Science Data science includes the delivery of predictive or prescriptive analytics models using machine learning and deep learning techniques and/or using cognitive services and or AI. Data science includes the exploration to uncover patterns that could be leveraged in the development of analytics models. Data science includes the execution of Machine Learning Operations (MLOps) activities related to the deployment and ongoing model execution.</p>			Primary
<p>Data Platform and Environment Support Data platform is an integrated technology solution that allows data located in database (s) to be governed, accessed, and delivered to users, data applications, or other technologies for strategic business purposes.</p>	Secondary	Secondary	
<p>System and/or Database Administration System administration refers to the whole set of activities to ensure that a database is always available.</p>		Secondary	
<p>Data Analysis Data analysis is a process that focus on cleaning and transforming raw data, mining for insights that are relevant to the business' primary goals, and drilling down into this information to transform metrics, facts and figures into initiatives that benefit improvement.</p>		Primary	Secondary
<p>Security Analysis Security analysis is a method of analyzing the data to produce proactive security measures.</p>		Primary	
<p>Data Literacy Data literacy is the ability to spot and identify opportunities to use data to improve decision making, business insights and operational efficiency in a secure and responsible way.</p>	Primary		
<p>Data Marketplace Data marketplaces accelerate and facilitate data circulation amongst many stakeholders, allowing them to source, distribute, commercialize and exchange data securely, in full compliance with regulations.</p>		Primary	
<p>Data Quality Data quality is a set of systems and processes that work together to ensure the uniformity, accuracy, stewardship, semantic consistency and accountability of EDC's shared master data assets.</p>		Primary	

<p>Data Management Data management is the discipline of developing and implementing solutions for the control of processes for sourcing, transport, usage, storage, retention and disposal of enterprise information.</p>	Primary	Primary	
<p>Master/Reference Data Management Master data management is control over master data values to enable consistent, shared, contextual use across systems, of the most accurate, timely and relevant version of truth about essential business entities. Reference data management is the management of data used to classify or categorize other data.</p>	Primary	Secondary	

For each category of Services and Deliverables set out in this section, the Preferred Proponents may be required to provide resources to deliver such Services and Deliverables. The types of Resources EDC may require are set out in Appendix E of this RFP.

Deliverables shall be provided to EDC as stated in the approved and executed Work Package(s). Each individual Work Package raised against the Agreement will outline their specific deliverables and timelines, as applicable.

1.3	INVITATION TO PROPONENTS
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This RFP is an invitation to prospective Proponents to submit Proposals for the provision of goods and/or services as more fully described in Part 4 of this RFP – Services and Deliverables. EDC will use this RFP to describe its requirements (mandatory and rated), ask Proponents for their proposed solutions, describe the terms and conditions of this RFP process, describe the criteria which will be used in evaluating the Proposals and set out the terms and conditions under which EDC will contract with the Preferred Proponents.

The scope of the Services and Deliverables is broad, and a single Proponent may not offer the wide range of Services and Deliverables required. Proponents are welcome to sub-contract, subject to the requirements under clause 1.3 of the Agreement (see Appendix A of this RFP).

1.4	SCOPE AND TERM OF AGREEMENT
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The Agreement establishes general terms and conditions and a description of the Services and Deliverables applicable to all Work Packages under the Agreement. The Work Package constitutes the actual contractual commitment and defines in detail the Services and Deliverables to be provided.

EDC will not accept amendments, deletions or additions to the terms and conditions contained in the Agreement. The parties to the Agreement may, however, negotiate the Business Terms contained in the Work Package. “Business Terms” are clauses that deal strictly with the nature and quality of the Services and Deliverables, delivery schedules and/or milestones, payment terms and payment schedules.

EDC makes no guarantee of the minimum value or volume of work to be assigned to the Preferred Proponents.

1.5	NO EXCLUSIVITY OF CONTRACT
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The Agreement executed with the Preferred Proponents will not be an exclusive contract for the provision of the described Services and Deliverables. EDC may contract with others for the same or similar Services and Deliverables to those described in this RFP or may obtain the same or similar Services and Deliverables internally.

1.6	DEFINITIONS
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Unless otherwise specified in this RFP, capitalized words and phrases have the meanings set below:

“Business Day”	Means any day of the week except Saturday and Sunday when EDC is open for business.
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“Business Terms”	Has the meaning prescribed to it in section 1.4 of this RFP.
“Client Reference”	<p>A Client Reference for the purposes of this RFP is defined as follows:</p> <ul style="list-style-type: none"> • is not an individual person – it is therefore not acceptable to provide multiple individuals within the same client organization or project as a Client Reference; and • is not related or connected to the Proponent, for example not one that has the same parent company as the Proponent; and • is not one of its subcontractors that would be responsible for providing any part of the Deliverables; • is separate and distinct, i.e. where two Client References are requested, the same organization may not be used in response to both Client References; and • is for a separate and distinct project, i.e. one project that involved multiple organizations may only be used as one Client Reference.
“Comply” or “Compliant”	<p>For the purposes of this RFP, “Comply” and “Compliant” means that the Proposal conforms to the Mandatory Requirements without material deviation or reservation. In the sole and absolute determination of EDC, a “material deviation or reservation” is one:</p> <ul style="list-style-type: none"> • which affects in any substantial way the scope, quality or performance of the proposed Requirement; • which results in the material component of a Requirement not being complied with; or whose rectification would affect unfairly the competitive position of other Proponents with Proposals complying with the Requirements identified in the Request for Proposals document or potential proponents who might have submitted a response to this RFP.
“Contradictory Information”	Means conditional or qualifying statements or any ambiguity between the Proposal and the Services and Deliverables.
“EDC Contact”	<p>Means rfp@edc.ca</p> <p>All communication with EDC (other than submission of the Proposal) is to be directed via email to the above email address and must reference the RFP number.</p> <p>See RFP Timetable, section 2.6, for the RFP Clarification Period and Submission Date and Time.</p>
“Financial Proposal”	Means the Proposal requirements which include the Pricing Forms and financial assessment section of this RFP
“Mandatory Requirement(s)”	Means the Proposal requirements specified in Section 3.1 “Mandatory Requirements”, the Annexes, and the requirements in this RFP to which the Proponent must respond in its Proposal and which are identified by the words “must” or “shall” or “will” and/or followed by the symbol “(M)”, as in the phrase “must (M) provide”.
“Non-Compliant”	For the purposes of this RFP, “Non-Compliant” means that the Proposal contains material deviations or reservations from the Mandatory Requirements set out in this RFP.
“Preferred Proponent(s)”	Means the entity or entities with which EDC enters into an Agreement for the provision of Services and Deliverables under this RFP.
“Proponent”	Means an identified entity that has been accepted by EDC as a participant in this process.
“Proposal”	Means the documentation submitted to EDC by the Proponent in response to this RFP including any supporting or supplementary information provided by a Proponent and accepted in writing by EDC for purposes of clarification and/or validation as part of the evaluation of the Proposal.
“Rated Requirement”	A rated item is identified throughout this RFP by the words “rated”, “should” and/or followed by the symbol “(R)” and will be assigned points based on pre-determined scoring criteria. Each rated item has an associated weight in the decision model (see Appendix D “Weighted Decision Model”). Responses to rated items will be evaluated on the extent to which they meet or exceed the requirements.
“Rectification Notice”	Means a written notice delivered by EDC to a Proponent requesting that it clarify and/or rectify any aspect of its Proposal.
“Rectification Period”	Means five (5) business days from the date EDC delivers a rectification notice to a Proponent identifying the deficiencies in the Proponent’s Proposal.

“Resource Category(ies)”	Means a grouping of service delivery resources for which distinct volumes are measured and charging rates or other charging mechanisms apply. Proponents will provide EDC with rates per resource category defined in Appendix E as part of their Proposals.
“RFP”	Means this Request for Proposal.
“RFP Process”	Means the process as described at Section 2 of this RFP, and also includes Proposal requirements. For clarity, the RFP process begins with the issuance of the RFP and its documents and ends when EDC and the Preferred Proponent have executed a definitive agreement.
“Services and Deliverables”	Means the categories of services and deliverables specified in section 1.2.1 of this RFP “Services and Deliverables” to be allocated to the Preferred Proponents under the Agreement through Work Packages. The details of the Services and Deliverables EDC needs will be described in each Work Package.
“Total Evaluated Price”	Means the amount that will be established using the prices provided by the Proponent in the Pricing Forms attached as Appendix C.
“Work”	Means the whole of the work, services, products and materials required to be done, furnished and or performed by the Preferred Proponent in order to carry out the RFP requirements.
“Work Package”	Means a document requesting work from Preferred Proponents setting out the bundle of services and deliverables to be allocated to a Preferred Proponent in accordance with the Work Package allocation process set out in the Agreement and any other Business Terms, whether contained in a Proposal or developed by EDC.

2.	THE RFP PROCESS
In accordance with EDC’s Procurement Policy, EDC undertakes competitive procurement processes (such as an RFP) that demonstrate a fair and equitable treatment of all Proponents.	

2.1	RFP CLARIFICATION PROCESS
<p>Should the Proponent discover discrepancies, ambiguities, or omissions in this RFP, or should the Proponent be in doubt as to the meaning of any requirement (whether Mandatory (M), Rated (R)) or the Services and Deliverables, or have concerns about meeting a requirement, it should immediately notify the EDC Contact. EDC will not be responsible for any misunderstanding on the part of the Proponent concerning this RFP or its process. All requests will be given due consideration and EDC will, in its sole determination, make adjustments or not make adjustments based on EDC’s business requirements.</p> <p>The Proponent is solely responsible for identifying and seeking such clarifications to the specifications as may be required to fully understand the Work to be carried out and to price the resources to be utilized in the event of contract award. Questions about the intent or meaning of any part of this RFP may be asked up to the RFP Clarification deadline as indicated in the RFP Timetable in Section 2.6.</p> <p>Questions must be in writing and must be sent by email to the EDC Contact. At the discretion of EDC, clarifications may be issued as an addendum and sent to each Proponent. Proponents must not address any questions on the RFP to any EDC officer or employee verbally and EDC will not respond to verbal questions relating to the RFP.</p>	

2.2	PROPOSAL SUBMISSION DEADLINE
To be considered, Proposals must be submitted as follows:	
EMAIL:	<ol style="list-style-type: none"> 1. An electronic copy (PDF or MS Word preferred) of the Proposal (this may be comprised of multiple files) AND 2. A separate electronic copy of the Financial Proposal (MS Excel preferred).
DEADLINE FOR SUBMISSION:	1:00 pm Ottawa, Ontario, Canada local time on April 26th, 2021. “Official Time Clock” is the time displayed on the EDC server.

LABELING:	Label all emails with the title and RFP number.
SUBMISSION ADDRESS:	RFP@edc.ca If necessary, EDC may provide a drop box for larger submissions (greater than 10MB) and if notified at the point of confirmation of participation (see Section 2.6 RFP Timetable).

Each Proponent shall assume full responsibility for delivery and deposit of the completed Proposal no later than the specified Deadline for Submission as indicated above. EDC is not responsible for any loss or delay with respect to the delivery of the Proposals.

Subject to any reserved rights of EDC and/or except as permitted in this RFP, **ANY PROPOSAL, DOCUMENT, OR INFORMATION RECEIVED AFTER THE DEADLINE FOR SUBMISSION WILL NOT BE CONSIDERED.**

In the evaluation process, the evaluation team cannot review material that was not submitted within the Proposal. For further clarity as an illustrative example: if the Proponent provides a link to a website for substantiating information, this would be considered “information provided after the submission date” and information contained on the website would not, therefore, be considered during the evaluation process (i.e. neither in response to a mandatory nor a rated requirement.) **In the case where a sample is to be provided, screen shots of the example should be provided to EDC, since a link to a webpage where the example can be found will not be accepted.**

Links to external websites and embedded documents are not permitted in the Proposal documentation.

2.3 RFP EVALUATION

Proposals received will be evaluated in accordance with the selection methodology described below. The following details the steps in the selection methodology:

STAGE I	MANDATORY REQUIREMENTS	This will consist of a review by EDC to determine which Proposals comply with all of the Mandatory Requirements. If a Proposal fails to satisfy all of the Mandatory Requirements, EDC will issue the Proponent a Rectification Notice identifying the deficiencies and providing the Proponent an opportunity to rectify the deficiencies. If the Proponent fails to satisfy the Mandatory Requirements within the Rectification Period, its Proposal will be rejected. The Rectification Period will begin to run from the date and time that EDC issues a Rectification Notice to the Proponent. The Mandatory Requirements are set out in Section 3.1 of this RFP.
STAGE II	RATED REQUIREMENTS	The evaluation of the Proposal will consist of a scoring by EDC of each Proposal passing Stage I to determine the scoring of the Rated Requirements. See Appendix D for the value of Stage II requirements.
STAGE III	INTERVIEW	Up to the top eight (8) scoring Proponents from Stage II - Rated Requirements will advance to Stage III - Interview. Proponents will be required to answer questions about their Proposal. The interview questions that asked of Proponents are set out in Appendix F.
STAGE IV	FINANCIAL ASSESSMENT	The evaluation of the Financial Proposal will consist of a scoring by EDC based on the methodology described in Section 2.3.4 and Appendix C. At the conclusion of Stage IV, the scores from Stages II for Proposals will be combined with scores from Stage III and Stage IV to rank the Proponents. Proponents should refer to the Table 2-0: Weighted Decision Model table for the weighted value of Stage II, Stage III, and Stage IV.

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TABLE 2-0: WEIGHTED DECISION MODEL		Maximum Points
	STAGE II - Rated Requirements	70
	STAGE III – Interview	20
	STAGE IV – Financial Assessment	10

	TOTAL	100
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2.3.1	STAGE I – MANDATORY REQUIREMENTS
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After a review to ensure compliance with the Mandatory Requirements relating to the form and content of the Proposal, the Proposals will be assessed for compliance with the Mandatory Requirements relating to the Services and Deliverables under Section 4 of this RFP. Mandatory Requirements are Proposal Requirements, which are identified by the word “**must**” or “**shall**” or “**will**” and/or followed by the symbol “**(M)**”.

Please provide any supporting literature or any other relevant information required to substantiate the Mandatory Requirement with the Proposal and not just reference such literature or information in the Proposal. Any literature or information not so submitted will not be considered in the evaluation of the Proponent’s Proposal.

Proponents must address and answer each Mandatory Requirement within their Proposal. Proponents must clearly indicate compliance or non-compliance with Mandatory Requirements and provide the necessary information in their Proposal to substantiate the Proponent’s ability to comply with the Mandatory Requirement. These responses should include the section number of the RFP, a statement of compliance or non-compliance, and should either give a detailed response to the requirement, or clearly direct the evaluation team to where the evidence of compliance can be located in the Proposal. Determination of a Proponent’s compliance with Mandatory Requirements (except the Mandatory Requirements for Services and Deliverables under Section 4) will be based on an examination of the evidence demonstrating compliance with such requirements and not solely on the Proponent’s declaration of compliance. Determination of a Proponent’s compliance with the Mandatory Requirements set out under Section 4 will be based on the Proponent’s self-declaration for the purposes of creating the initial Qualified Supplier Roster or the purposes of refreshing the roster annually; however, EDC reserves the right to vet a Proponent’s ability to comply with the Mandatory Requirements set out under Section 4 at the second stage competitive process where Preferred Proponents will be bidding for Work Packages.

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	REQUIREMENT	RFP RESPONSE	COMMENT
TABLE 2-1: EXAMPLE MANDATORY REQUIREMENT	The Proponent must (M) complete the Mandatory Requirements Summary in Section 3.1 and satisfy all such Mandatory Requirements.	COMPLIANT (<i>We have completed, satisfied, and attached the Mandatory Requirements Summary in Section 3.1 and attached it as Appendix YY to our Proposal.</i>)	<i>The Proponent’s substantiation to this Mandatory Requirement is located on page X of the Proposal. (Please note that links to online examples will not be accepted).</i>

2.3.2	RATED REQUIREMENTS
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Proposals that are determined to be compliant at Stage I – Mandatory Requirements, will be evaluated against predetermined weighted Rated Requirements.

Written Proposal

In *Stage II*, the Proponent’s Proposal will be evaluated based on the degree to which it meets EDC’s business requirements. A Rated Requirement is identified throughout Section 3.2 of the RFP by the words “**should (R), rated (R) and/or followed by the symbol (R)**”. Proponents’ responses to Rated Requirements will be evaluated against the rated requirement for each criterion along with the weight of each criterion is provided in Appendix D, “Weighted Decision Model”.

EDC’s “Services and Deliverables” is set out in section 1.2.1 of this RFP and the appendices referenced in that section. Proponents should refer to and reference the statements in this section and the applicable appendices when responding to Rated Requirements.

Client References

As part of *Stage II*, EDC will contact and vet the Proponent’s Client References by email, in accordance with the following procedure:

- a) For reference checks, EDC will conduct the reference check in writing by email. EDC will send all email reference check requests to contacts supplied by all the Proponents using the email address provided in the Proposal. EDC will not award any points unless the response is received within 5 working days of the date that EDC’s email was sent.
- b) On the third working day after sending out the reference check request, if EDC has not received a response, EDC will notify the Proponent by email, to allow the Proponent to contact its reference directly to ensure that it responds to EDC within 5 working days of the date that EDC’s initial email was sent. If the individual named by a Proponent is unavailable when required during the evaluation period, the Proponent may provide the name and email address of an alternate contact person from the same customer. Proponent will only be provided with this opportunity once for each customer, and only if the originally named individual is unavailable to respond (i.e., the Proponent will not be provided with an opportunity to submit the name of an alternate contact person if the original contact person indicates that he or she is unwilling or unable to respond). The 5 working days will not be extended to provide additional time for the new contact to respond.
- c) Wherever information provided by a reference differs from the information supplied by the Proponent, the information supplied by the reference will be the information evaluated.
- d) For a given project, points will not be allocated if:
 - a. the client reference states they are unable or unwilling to provide the information requested, or
 - b. the client reference states that the project is substantially different from the project described by the Proponent, or
 - c. the client reference is not a client of the Proponent itself (for example, the client cannot be the client of an affiliate of the Proponent instead of being a client of the Proponent itself).

Nor will points be allocated if the client is itself an affiliate or other entity that does not deal at arm's length with the Proponent.

At the conclusion of Stage II, only the top eight (8) Proposals (based on the highest ratings) will proceed to Stage III.

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	REQUIREMENT	RFP RESPONSE	COMMENT
TABLE 2-2: EXAMPLE WRITTEN RATED REQUIREMENT	The Proponent should (R) provide a detailed description of the Proponent’s depth and breadth of experience in relation to...	COMPLIANT (<i>X Company has the required experience in relation to X as required by EDC</i>) ...	<i>The Proponent’s substantiation to this Rated Requirement is located on page X of the Proposal. (Please note links to online examples will not be accepted).</i>

DETAILED RESPONSES

Proposals should contain detailed responses and clearly reference any attached substantiating documentation. Responses and substantiating documentation should be clear, direct, and grouped together with an index provided to make it easy for the evaluation team to locate a particular item.

Proposals that do not respond to a particular rated item may receive a zero-point score for that item. Where the evaluation team cannot reasonably find responses to a rated item, a zero-point score will be assessed for that item. Where a response contains a qualified or conditional statement, this may result in as little as a zero-point score.

Links to external websites are not permitted

2.3.3 STAGE III – INTERVIEW

Up to the top eight (8) scoring Proponents, as determined at the end of Stage II, will be invited to present to EDC in order to elaborate on their capability to perform the work. Interviews will be conducted per the timeline in Section 2.6 RFP Timetable. The Proponent **must (M)** attend this interview.

Proponents will be required to answer questions about their Proposal, which will be evaluated by EDC. The interview questions and associated weighting are included in Appendix F – Interview Questions.

Full details of the interview process, including timing and the required Proponent participants, will be provided to all Proponents that have advanced to Stage III.

Proponents should refer to the Table 2-0: Weighted Decision Model table for the weighted value of Stage III.

2.3.4 STAGE IV – FINANCIAL ASSESSMENT

Pricing Forms are provided as Appendix C to the RFP. These Pricing Forms constitute the Proponent’s Financial Proposal.

The Proponent **must (M)** complete the Financial Proposal as a separate, detailed cost proposal that includes all costs for provision of the proposed goods and services. The Proponent **must (M)** provide the Pricing Forms as provided in Appendix C and **must (M)** be completed in their entirety. Proponents **must (M)** complete each of the cells with a numeric value, i.e. if there is no cost associated with the cell; the Proponent must enter a “0”. N/A, dashes, textual comments, or references to other documentation are not appropriate answers and **will** not be accepted.

The Proponent must not include any assumptions as part of the price proposal. Any clarification required with respect to pricing must be addressed through the RFP Clarification process. As a Mandatory Requirement, the Pricing Forms will be subject to the rectification process outlined in Section 2.3, Stage I.

Financial Proposals are evaluated only if the Proponent is one of the top eight (8) scoring Proponents, as determined at the end of Stage II, and complied with the mandatory requirements above. Technically Responsive Proposals will be evaluated based on the hourly rate proposed for the Resource Category.

Financial Evaluation:

- a) **STEP 1 - POINTS ALLOCATION:** For each Resource Category points will be allocated as follows:
 - i. Points will be allocated using the following calculation, which will be rounded to two decimal places:

$$\frac{\text{Lowest proposed firm hourly rate}}{\text{Proponent's proposed firm per hourly rate}}$$

- b) **STEP 2 – RATED FINANCIAL SCORE:** Points allocated under STEP 1 for each Resource Category will be added together and rounded to two decimal places.
- c) **STEP 3 – FINANCIAL ASSESSMENT SCORE:** The financial assessment score will be calculated as follows:

$$\text{Financial Assessment Score} = \left(\frac{\text{Proponent rated financial score}}{\text{Total possible rated financial score (22)}} * 10 \right)$$

2.4 SELECTION OF PREFERRED PROPONENT

Based on the sum of the scores in Stages II, III and IV of the RFP, EDC will rank Proponents in descending order by their combined rated requirement, interview and financial assessment scores. In the event there is a tie for the position of the fifth highest scoring Proponent, Proponents who are tied for that position will be ranked in descending order by Rated Requirement score and then by interview score.

Up to five (5) highest-scoring Proponents will be the Preferred Proponents forming the initial Qualified Supplier Roster.

Subsequent steps identified below only apply to the Preferred Proponents with whom EDC enters into an Agreement within a reasonable amount of time.

2.5	CONTRACT AWARD
<p>The Preferred Proponents shall agree to the terms and conditions of the Master Framework Agreement (Appendix A). The Agreement establishes general terms and conditions and description of services applicable to all Work Packages under the Agreement. The Work Package constitutes the actual contractual commitment and defines in detail the services to be provided and the related Business Terms.</p>	
2.5.1	PREFERRED PROPONENT REPRESENTATIVE
<p>The Preferred Proponents will each name a duly authorized representative who may be its solicitor or an officer or individual with decision-making authority and notify EDC of same.</p>	
2.5.2	NO GUARANTEE OF A DEFINITIVE AGREEMENT
<p>All Proponents acknowledge and agree that when a Proponent is selected as a Preferred Proponent, neither EDC nor the Preferred Proponent will be bound to enter into a definitive agreement; however, if the Preferred Proponent chooses to proceed with entering into a definitive agreement with EDC, such agreement shall be in the form attached as Appendix A, without modification. EDC and the Preferred Proponent may, however, negotiate the Business Terms contained in each Work Package, unless such negotiation is specifically prohibited in the corresponding Work Package Request Form. The Work Package will constitute the actual contractual agreement containing a detailed scope of work, cost and duration.</p>	

2.6	RFP TIMETABLE
RFP Issuance	March 31 st , 2021
Deadline for receipt of Proponent questions	April 9 th , 2021
EDC responses to questions	April 14 th , 2021
Proposal submission Deadline	April 26 th , 2021
Interviews	May 5 th , 2021 – May 10 th , 2021
Notify Proponents	May 13 th , 2021
<p>The RFP timetable is tentative only and may be changed by EDC in its sole discretion.</p>	

3.	PROPOSAL REQUIREMENTS
<p>Section 3 contains Mandatory Requirements (M) as well as Rated Requirements (R) upon which the Proponent’s Proposal will be evaluated.</p> <p>Mandatory Requirements must be met for a Proposal to be deemed Compliant and proceed to the evaluation of Rated Requirements.</p> <p>Mandatory Requirements are identified by the words “must” or “shall” or “will” and/or followed by the symbol “(M)”, as in the phrase “must (M) provide”. If a Proposal fails to satisfy all of the Mandatory Requirements, EDC will issue the Proponent a Rectification Notice identifying the deficiencies and providing the Proponent an opportunity to rectify the deficiencies. If the Proponent fails to satisfy the Mandatory Requirements within the Rectification Period, its Proposal will be rejected. The Rectification Period will begin to run from the date and time that EDC issues a Rectification Notice to the Proponent. The Mandatory Requirements are set out in Sections 2.3.2, 3 and 4 of this RFP.</p> <p>The Proponent is must (M) provide a response to the Rated Requirements detailed in Section 3.2 and the appendices referenced in that section and will be scored against the pre-determined weighted evaluation criteria.</p> <p>Rated Requirements are identified by the use of the words “rated”, “should” and/or followed by the symbol “(R)”. Failure to address a rated requirement will result in the requirement, or sub-element of the requirement, being scored zero.</p> <p>When responding to Part 3, Proponents must (M) consider the Services and Deliverables described in Section 1.2.1 and the Mandatory Requirements set out in section 4.</p> <p>In the event that Contradictory Information is provided by a Proponent with respect to a Mandatory Requirement, EDC will issue the Proponent a Rectification Notice seeking clarification from the Proponent. Proponents are hereby advised that</p>	

failure to rectify any such Contradictory Information within the Rectification Period will result in the Proposal being deemed Non-Compliant which will mean that the Proposal shall not be given any further consideration.

3.1. MANDATORY PROPOSAL REQUIREMENTS

1. The Proponent **must (M)** agree to execute EDC’s “Consulting Services Agreement” (Appendix A) without amendment, except as specifically permitted herein
2. The Proponent **must (M)** provide completed pricing tables (Appendix C) for all Resource Categories required under this Request for Proposal.
3. The Proponent **must (M) (R)** provide one (1) client reference for each project provided in Section 3.2.1 as part of the response. The information required by EDC is as follows:
 - o Client Contact Name
 - o Client Location
 - o Client Email Address
 - o Client Title
 - o Client Role on the Project
4. The Proponent **must (M)** provide EDC with three project summaries to demonstrate experience providing consulting services and system integration services that are specific to one or more of the following work streams:
 - o Data strategy & governance
 - o Enterprise data platform
 - o Data science (i.e. business intelligence, advanced analytics, artificial intelligence, machine learning etc.)

The referenced projects must meet the eligibility criteria listed below:

 - o The contract value of the project must have exceeded \$500K CAD including taxes.
 - o The project summary must reference achieved measurable results, including but not limited to cost savings, and performance improvements.
 - o The project must have been performed within the last five (5) years from the closing date of EDC Data Analytics RFP. Projects currently underway are acceptable, if demonstrable results have already been obtained.

A maximum of three (3) projects will be considered. If more than three (3) projects are submitted, only the first three (3) in order of presentation will be considered.

3.2 WRITTEN RATED PROPOSAL REQUIREMENTS

3.2.1 Point Rated Criteria

RT1

Rated Project #1

The Proponent should (R) provide EDC with a project summary to demonstrate experience providing consulting services and system integration services that are specific to the following work stream:

- Data Strategy & Governance

The Proponent should (R) demonstrate how the referenced project meets the eligibility criteria listed below:

- The contract value of the project should have exceeded \$500K CAD including taxes.
- The Project Summary should also highlight project management, change management and business analysis activities.
- The project summary should reference achieved measurable results, including but not limited to cost savings, and performance improvements.
- The project should have been performed within the last five (5) years from the closing date of EDC Data Analytics RFP. Projects currently underway are acceptable, if demonstrable results have already been obtained.

The Proponent response should (R) include the following:

- o A detailed description of the project, including value, description of measurable results, and the start and end date.

- Description of the Services Delivered, referencing the specific Services described in Section 1.2.1 of the RFP. Including one or more primary services within a service area along with any other secondary services and deliverables.
- Description of the Resources used to deliver the project, referencing the specific resources described in Appendix E.
- The client reference for the project. The information required by EDC is as follows:
 - i. Client Contact Name
 - ii. Client Location
 - iii. Client Email Address
 - iv. Client Title
 - v. Client Role on the Project

Failure to provide a client reference with all required information will result in a zero-point score for the project. A description of how EDC will contact the reference is described in Section 2.3.2

RT2

Rated Project #2

The Proponent should (R) provide EDC with a project summary to demonstrate experience providing consulting services and system integration services that are specific to the following work stream:

- Enterprise Data Platform

The Proponent should (R) demonstrate how the referenced project meets the eligibility criteria listed below:

- The contract value of the project should have exceeded \$500K CAD including taxes.
- The Project Summary should also highlight project management, change management and business analysis activities.
- The project summary should reference achieved measurable results, including but not limited to cost savings, and performance improvements.
- The project should have been performed within the last five (5) years from the closing date of EDC Data Analytics RFP. Projects currently underway are acceptable, if demonstrable results have already been obtained.

The Proponent response should (R) include the following:

- A detailed description of the project, including value, description of measurable results, and the start and end date.
- Description of the Services Delivered, referencing the specific Services described in Section 1.2.1 of the RFP. Including one or more primary services within a service area along with any other secondary services and deliverables.
- Description of the Resources used to deliver the project, referencing the specific resources described in Appendix E.
- The client reference for the project. The information required by EDC is as follows:
 - i. Client Contact Name
 - ii. Client Location
 - iii. Client Email Address
 - iv. Client Title
 - v. Client Role on the Project

Failure to provide a client reference with all required information will result in a zero-point score for the project. A description of how EDC will contact the reference is described in Section 2.3.2

RT3

Rated Project #3

The Proponent should (R) provide EDC with a project summary to demonstrate experience providing consulting services and system integration services that are specific to the following work stream:

- Data science (i.e. Business Intelligence, Advanced Analytics, Artificial Intelligence, Machine Learning, etc.)

The Proponent should (R) demonstrate how the referenced project meets the eligibility criteria listed below:

- The contract value of the project should have exceeded \$500K CAD including taxes.
- The Project Summary should also highlight project management, change management and business analysis activities.
- The project summary should reference achieved measurable results, including but not limited to cost savings, and performance improvements.
- The project should have been performed within the last five (5) years from the closing date of EDC Data Analytics RFP. Projects currently underway are acceptable, if demonstrable results have already been obtained.

The Proponent response should (R) include the following:

- A detailed description of the project, including value, description of measurable results, and the start and end date.
- Description of the Services Delivered, referencing the specific Services described in Section 1.2.1 of the RFP. Including one or more primary services within a service area along with any other secondary services and deliverables.
- Description of the Resources used to deliver the project, referencing the specific resources described in Appendix E.
- The client reference for the project. The information required by EDC is as follows:
 - i. Client Contact Name
 - ii. Client Location
 - iii. Client Email Address
 - iv. Client Title
 - v. Client Role on the Project

Failure to provide a client reference with all required information will result in a zero-point score for the project. A description of how EDC will contact the reference is described in Section 2.3.2

RT4

Rated Resumes #4

The Proponent should (R) provide EDC with one (1) resume for each of the five (5) roles listed below:

- Data Architect
- Data Engineer
- Data Scientist
- MDM Integration Analyst/Engineer
- MDM Solution Architect

RT5

The Proponent should (R) provide a completed Compliance and Privacy Requirements as per Appendix B.

4. MANDATORY REQUIREMENTS FOR SERVICES AND DELIVERABLES (M)

This section of the document details the Mandatory Requirements relating to the Services and Deliverables that each Proponent **must (M)** be able to provide to EDC in order to be considered.

These Deliverables are indicated by the use of the word “shall”. ***By providing a Proposal the Proponent is deemed to be agreeing to provide these Deliverables as stated.*** Unless otherwise stipulated in this RFP, no response is necessary as part of the Proposal, see clause 5.5.7.

Every Requirement does not necessarily require a specific or separate response. By submission of a Proposal in response to this Request for Proposal, the Proponent is agreeing to provide the Services and Deliverables identified in this section at the prices or using the pricing methodology identified in the Proponent’s Financial Proposal as appropriate. The Proponent

should, therefore, immediately notify EDC should there be any need for clarification or request for an amendment to the Deliverables. Any changes as a result of the clarification process may be issued via addendum by EDC to all Proponents.

4.1 ACCOUNT MANAGEMENT

4.1.1 BILINGUAL SERVICES

The Proponent **must (M)**:

1. As and when requested in a Work Package, provide bilingual or unilingual (in both official languages) forms and documentation.

4.1.2 SECURITY

The Proponent **must (M)**:

1. Provide resources that have a minimum of Enhanced Reliability security clearance or equivalent as determined by EDC Security.

4.1.3 WORK LOCATION

The Proponent **must (M)**:

1. As and when requested in a Work Package, provide resources to work remotely.

5. TERMS AND CONDITIONS OF THIS RFP

5.1 NO COLLUSION

By submitting a Proposal, each Proponent certifies that its Proposal has been prepared without any connection, knowledge, comparison of information or arrangement with any other Proponent (or any employee, representative, subcontractor, supplier, or agent thereof), and each Proponent is responsible to ensure that its participation in this RFP process is conducted fairly and without collusion or fraud.

Should a Proponent, the Preferred Proponent, or any of their respective agents, subcontractors, partners or third-party participants give or offer any gratuity to, or attempt to bribe any member of EDC, or directors, officers, agents or employees of EDC, or attempt to commit fraud against EDC, EDC shall be at liberty to disqualify the Proponent/ Preferred Proponent, declare any offer or award of a contract void forthwith and/or terminate any contract then in effect immediately, without penalty or prejudice.

5.2 CONFLICTS OF INTEREST

All Proponents are required to disclose to the EDC RFP contact any real or potential conflicts of interest or any situation that may be perceived as a conflict of interest as soon as such conflict arises. A conflict of interest includes but is not limited to: personal relationships between EDC, its officials, directors, officers, employees, agents or independent consultants and the Proponent, any of its directors, officers, employees, agents, subsidiaries and parent organizations.

If EDC, at its sole discretion and at any time, is of the view that a conflict of interest exists or could be perceived to exist, it shall have the right to disqualify the affected Proponent, terminate negotiations with the Preferred Proponent immediately, or terminate any agreement then in effect with the Preferred Proponent immediately, without prejudice or penalty. Without limiting EDC's rights to take any of the foregoing actions, EDC may also ask the Proponent or Preferred Proponent to take such measures as EDC deems necessary to resolve the conflict of interest and if such conflict is resolved to the satisfaction of the appropriate EDC authorities, the Proponent need not be disqualified and any negotiations or agreements then in effect may not need to be terminated.

5.3 PROPONENT'S COSTS AND EXPENSES – NO DAMAGES

Any and all costs incurred by a Proponent in responding to this RFP, including costs incurred in making necessary studies for the preparation of the RFP, to procure or contract for any goods and services, to respond to EDC's questions, to conduct demonstrations, or any other related activities including travel, living, incidental and other out of pocket costs shall be borne solely by the Proponent. The rejection of any or all Proposals for any reason shall not render EDC liable for any costs, expenses or damages incurred by any Proponent. All Proposal documents will become the property of EDC.

5.4 RESERVED RIGHTS OF EDC

1. Make public the names of any or all Proponents and the name of the Preferred Proponent;
2. Request written clarification or the submission of supplementary written information in relation to a clarification request from any or all Proponents, incorporate a Proponent's response to that request for clarification into a Proponent's proposal or communicate the clarification to all Proponents;
3. Adjust a Proponent's scoring or reject a Proponent's proposal on the basis of:
 - 3.1. A financial analysis determining the actual cost of the proposal when considering factors including quality, service, price and transition costs arising from the replacement of existing goods, services, practices, methodologies and infrastructure (howsoever originally established);
 - 3.2. Information provided by references;
 - 3.3. The Proponent's past performance on previous contracts with EDC;
 - 3.4. The information provided by a Proponent pursuant to EDC exercising its clarification rights under this RFP process; or
 - 3.5. Other relevant information that arises or is obtained during this RFP process;
4. Waive formalities of this RFP;
5. Accept Proposals which substantially comply with the requirements of this RFP;
6. Verify with any Proponent or with a third party any information set out in a Proposal;
7. Check references other than those provided by any Proponent;
8. Disqualify any Proponent whose proposal contains misrepresentations or any other inaccurate or misleading information;
9. Disqualify any Proponent or the Proposal of any Proponent who has engaged in conduct prohibited by this RFP or by EDC's policies;
10. Make amendments to this RFP. Any revision shall be issued as an addendum to this RFP and shall be distributed to all participating Proponents by courier, fax or electronic mail. If such an addendum is issued, the Deadline for Submission may be extended by EDC if, in its sole opinion, more time is necessary to enable Proponents to revise their responses. The addendum shall state any such change to the Deadline for Submission, but EDC is not required to extend the Deadline for Submission under any circumstances;
11. Select any Proponent other than the Proponent whose Proposal reflects the lowest cost to EDC or the highest overall score;
12. Select any Proponent with whom EDC will commence the negotiation process. EDC reserves the right, in its sole discretion, to cease negotiation with the Preferred Proponent at any time and for any reason, and commence negotiations with any other Proponent at any time and for any reason;
13. Cancel this RFP or RFP process at any stage;
14. Cancel this RFP or RFP process at any stage and issue a new RFP for the same or similar deliverables;
15. Accept any Proposal in whole or in part;
16. Negotiate with any Proponent different or additional terms to those contemplated in this RFP or in any Proponent's Proposal;
17. If a single Proposal is received, reject the Proposal of the sole Proponent and cancel this RFP process or enter into direct negotiations with the sole Proponent;
18. Select a Preferred Proponent based on the scores assessed for the Proposal and financial proposal only (i.e. at the discretion of EDC not conduct the Proponent Presentations/Demonstrations);
19. Reject any or all Proposals in its absolute discretion; or
20. Change any and all dates, schedules, or deadlines of this RFP from time-to-time without liability whatsoever.

These reserved rights are in addition to any other express rights or any other rights which may be implied in the circumstances.

By submitting its Proposal, the Proponent authorizes the collection by EDC of the information set out under clauses (6) and (7) above in the manner contemplated in those subparagraphs.

It is acknowledged and understood by the Proponent that this Section is to be interpreted solely for the benefit of EDC and not for the benefit of the Proponent and that EDC is under no obligation to waive any of its rights to strict compliance under this RFP.

5.5	GENERAL CONDITIONS
5.5.1	LIMITATION OF LIABILITY
<p>EDC shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by any Proponent or any third party resulting from EDC exercising any of its express or implied rights under this RFP. No Proponent shall have any claim for compensation of any kind whatsoever, as a result of participating in this RFP, and by submitting a Proposal each Proponent shall be deemed to have agreed that it has no claim.</p>	
5.5.2	AMENDMENTS
<p>No amendment to the RFP shall be binding unless it is incorporated into the RFP by written amendment executed by the authorized representatives of EDC.</p>	
5.5.3	ASSIGNMENT
<p>No assignment of Proposals or Work shall be made in whole or in part, without the prior consent in writing of EDC. Any purported assignment made without EDC's consent is void and of no effect. EDC is under no obligation to consent to any assignment request. EDC further reserves the right to consent to any Assignment request.</p> <p>No assignment shall relieve any Proponent from any obligation under the Proposal or impose any liability upon EDC.</p>	
5.5.4	NOTICE
<p>Any notice made under this RFP shall be in writing and shall be delivered personally, sent by mail, or transmitted by fax, e-mail or other electronic means and shall be deemed to have been given and received, if delivered by hand, upon delivery, if sent by mail, the earlier of actual receipt and seven days after posting, and if transmitted by fax, e-mail or other electronic means the date of transmission, in each case excluding Saturday, Sunday and any national or statutory holiday when the offices of EDC are closed for business.</p>	
5.5.5	ENTIRE AGREEMENT
<p>This RFP constitutes the entire and sole agreement between the parties with respect to the subject matter of the RFP and supersedes all previous negotiations, communications and other agreements, whether written or oral, relating to it, unless they are incorporated by reference in the RFP. There are no terms, covenants, representations, statements or conditions binding on the parties other than those contained in the RFP.</p>	
5.5.6	APPLICABLE LAWS
<p>This RFP, any Proposal, the resultant Agreement and any related contracts shall be governed by and construed in accordance with the laws of the Province of Ontario and the applicable federal laws of Canada. Each party irrevocably and unconditionally attorns to the exclusive jurisdiction of the Provincial or Federal Courts located in the Province of Ontario for the purpose of any action or proceeding brought by either party.</p> <p>Any alternative jurisdictions submitted by any Proponents shall be void and of no effect.</p>	
5.5.7	CONFIRMATION AND ACKNOWLEDGEMENT
<p>By submitting a Proposal, the Proponent confirms that:</p> <ul style="list-style-type: none"> a) it has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP; b) if EDC selects the Proponent to enter into an Agreement, it will provide the Deliverables as detailed in Section 4, as well as abide by the commitments made in its Proposal in response to Section 3 of the RFP; c) it agrees to abide by such other terms, conditions, and provisions of the RFP; and d) there is not, nor was there any, actual or potential Conflict of Interest relating to the preparation of its Proposal, nor does it reasonably foresee any actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP. 	

APPENDIX A – FORM OF AGREEMENT

Under separate cover

APPENDIX B – COMPLIANCE & PRIVACY REQUIREMENTS

The Supplier **should (R)** respond to the following:

Privacy and Security over Data

i. Data Management

- a. Provide SOC 2 Type 2 attestation report.
- b. If SOC 2 type 2 is unavailable provide;
 1. Data flow diagram to illustrate how and from where data (personal information) will be collected, used, disclosed/communicated and retained, including:
 2. the location (city, country, domestic and international) where all EDC information (electronic and paper) would be stored, including the location of data centre(s), for both primary and backup/disaster recovery, that would host the data and the location of any back-up data centres;
 3. details regarding all storage of EDC information held outside your internal network (ex: Cloud storage, outsourced storage, 3rd party);
 4. the name and location (city and country) of any subcontractors and a detailed description of the services provided (example: administration, customer service, web/telephone support) and whether such services include the ability to download or store data;

ii. Privacy Management Plan

- a) EDC is subject to the Canadian [Privacy Act](#). Describe how your firm's Privacy Management Plan complies with Canadian Privacy Legislation, including:
 1. the applicable Privacy legislation in your jurisdiction
 2. administrative, technical and physical safeguards in place to protect personal information against loss or theft, as well as unauthorized access, disclosure, copying, use and modification;
 3. the circumstances under which your firm will disclose personal information;
 4. contingency plans and procedures in place to identify and respond to privacy breaches, including your communication plan to notify impacted parties;
 5. procedures for processing requests for access to or correction of personal information and how such requests and changes are logged and monitored;
 6. retention policy and procedures to ensure complete destruction of personal information at the end of the retention period;
 7. how system logs of transactions are monitored for inappropriate access, use and disclosure; and
 8. who within your firm is accountable for receiving and resolving privacy concerns.

iii. System, Site and Service Security

- a. If SOC 2 Type 2 attestation report is unavailable, provide one of these Alternate Attestation reports:
 1. Cloud Security Alliance STAR Attestation Audit Report
 2. Cloud Assessment tool questionnaire on Security Controls
 3. SOC 3 report
 4. Recent Penetration Test Report
- i. And also, the following;
 1. Describe data segregation process used to isolate EDC data from other customers
 2. Describe contingency plans and procedures in place to identify and respond to IT security related breaches and hacking. Describe notification procedures, including whether EDC would be notified as part of your incident response;

- i. Include descriptions of audits, threat risk assessment (TRAs), vulnerability assessments (VAs), penetration testing and any other security validation measures, including a breakdown between internal and external 3rd party validations;
 - ii. Regarding individuals with access to EDC info (employees, contractors, consultants, vendors) Describe screening measures, required certifications, and frequency of re-validation.
 - iii. Describe controls used and frameworks followed to protect EDC information at rest and in transit including network security, information storage security, security systems and monitoring, hours of coverage, administrative access controls and monitoring, separation of duties, need-to-know processes to ensure appropriate access.
 - iv. Describe physical site security measures in place to protect against unauthorized access, theft, disclosure, copying, use and modification;
- b) Describe how you secure electronic financial transactions (example: electronic banking). Provide details on the use of any third-party electronic payment services and current Third-Party Compliance & Certifications (examples: Payment Card Industry Data Security Standard (PCI-DSS), Office of the Superintendent of Financial Institutions (OSFI)); **if applicable**

iv. Business Continuity and Disaster Recovery Planning

- a) Describe your business continuity plans/disaster recovery plans in place to ensure all continuity of service in the event of an unanticipated event, disaster or other event that impacts the data center, including:
- Hot sites (e.g. back-up processing locations);
 - Resiliency and redundancy in IT solution; please identify any single points of failure (network line, applications, back-ups, etc.);
 - Estimated return to service time in the event of a disruption;
 - System/file back-ups, frequency, success rate and tape storage arrangements;
 - Test results from last disaster recovery test for service delivery.
- b) Is the disaster recovery plan reviewed by an outside auditor or consultant and how frequently is it tested? If audited, please provide any recommendations suggested by the auditors.
- c) Have you had to activate the plans during a real emergency or disaster? If so, please describe how your firm responded to the event(s).

APPENDIX C – PRICING FORMS

Proponent **must (M)** provide a firm hourly rate (in Canadian Dollars) for the resource categories outlined in Appendix “E”. The firm hourly rate is to include all expenses (including travel). The firm hourly rate is to include the cost of labour, fringe benefits, general and administrative expenses, overhead, profit and the like. All expenses normally incurred in providing the services (i.e. project office space, word processing, reports, photocopying, courier and telephone charges, local travel and the like) are included in the hourly rates identified below and will not be permitted as direct charges under any resulting Work Packages.

All rates are to be in Canadian Dollars (CAD) and be exclusive of Goods and Services Tax (GST), Harmonized Sales Tax (HST), and Provincial Sales Tax (PST) as applicable.

The hourly rates are fixed/firm CAD for the full period of the Agreement. The hourly rates for each resource in a specific category of personnel must be the same.

The Proponent **must (M)** enter a firm hourly rate with a numerical value greater than 0. N/A, dashes, textual comments, or references to other documentation are not appropriate answers and will not be accepted.

RESOURCE CATEGORY	FIRM HOURLY RATE
Product Owner	\$
Scrum Master	
Data Architect	
Data Engineer	
Data Analyst	
Sr. ETL Developer	
Data Scientist	
Data Quality Analyst	
MDM Product Owner	
MDM Program Manager	
MDM Scrum Master	
MDM Solution Architect	
MDM Data Architect	
MDM Data Engineer	
MDM Integration Analyst/Engineer	
MDM Data Analyst	
MDM DBA/Administrator	
MDM Systems Administrator	
MDM Business Analyst	
MDM Security Analyst	

Change/Communications Management Lead	
Business Analyst	

APPENDIX D – WEIGHTED DECISION MODEL

RT1 – Data strategy & governance			
ID	Requirement	Description	Maximum Points
1.1	Project summary	Project summaries will be graded based on the Evaluation Matrix provided below.	3
1.2	Service Experience	Demonstration of service experience related to the delivery of RT1 will be graded based on the Evaluation Matrix provided below.	3
1.3	Resource Experience	Demonstration of resource experience related to the delivery of RT1 will be graded based on the Evaluation Matrix provided below.	3
RT1 SCORE			9
RT2 – Enterprise data			
ID	Requirement	Description	Maximum Points
2.1	Project summary	Project summaries will be graded based on the Evaluation Matrix provided below.	3
2.2	Service Experience	Demonstration of service experience related to the delivery of RT2 will be graded based on the Evaluation Matrix provided below.	3
2.3	Resource Experience	Demonstration of resource experience related to the delivery of RT2 will be graded based on the Evaluation Matrix provided below.	3
RT2 SCORE			9
RT3 – Data science			
ID	Requirement	Description	Maximum Points
3.1	Project summary	Project summaries will be graded based on the Evaluation Matrix provided below.	3
3.2	Project Service	Demonstration of service experience related to the delivery of RT2 will be graded based on the Evaluation Matrix provided below.	3
3.3	Resource Experience	Demonstration of resource experience related to the delivery of RT2 will be graded based on the Evaluation Matrix provided below.	3
RT3 SCORE			9
RT4 – Rated resumes			
ID	Requirement	Description	Maximum Points
4.1	Resource resumes	Up to five (5) resumes will be graded based on the Evaluation Matrix provided below.	15
RT4 SCORE			15
RT5 – Compliance and privacy			
ID	Requirement	Description	Maximum Points
5.1	Compliance and privacy	Compliance and privacy response will be graded based on the Evaluation Matrix provided below.	5
RT5 SCORE			5

EVALUATION MATRIX

ELEMENT	INADEQUATE	SATISFACTORY	STRONG	EXCELLENT
Score	0 point	1 point	2 points	3 points

Project Summary Grading	The Proponent did not include a project summary that met the listed eligibility criteria and did not demonstrate experience in the rated work stream.	The Proponent included a project summary that meets the listed eligibility criteria and demonstrated experience in the rated work stream.	The Proponent included a project summary that meets the listed eligibility criteria and demonstrated relevant experience highlighting where the Proponent has performed activities as per section 4.2.1 in the rated work stream.	The Proponent included a project summary that meets the listed eligibility criteria and demonstrated relevant experience highlighting where the Proponent has performed activities as per section 4.2.1 in the rated work stream in addition the Proponent has demonstrated resource utilization and management.	
ELEMENT	INADEQUATE	SATISFACTORY	STRONG	EXCELLENT	
Score	0 point	1 point	2 points	3 points	
Project Service Grading	The Proponent did not demonstrate experience in any of the services listed in Section 4.2.1.	The Proponent demonstrated experience in one (1) service listed in Section 4.2.1.	The Proponent demonstrated a relevant experience in two or three (2-3) services listed in Section 4.2.1.	The Proponent demonstrated a very high degree of relevant experience in four (4) or more services listed in Section 4.2.1.	
ELEMENT	INADEQUATE	SATISFACTORY	STRONG	EXCELLENT	
Score	0 point	1 point	2 points	3 points	
Resource Experience Grading	The Proponent did not demonstrate the use of any resource listed in Appendix E.	The Proponent demonstrated the use of one (1) resource listed in Appendix E.	The Proponent demonstrated the use of two or three (2-3) resources listed in Appendix E.	The Proponent demonstrated the use of four (4) or more resources listed in Appendix E.	
ELEMENT	FAIL		PASS		
Score	0 point		3 points		
Resource Resume Grading	Resource resume does not meet all requirements listed in Appendix E for the resource category and/or is not present.		Resource resume meets all requirements listed in Appendix E for the resource category.		
ELEMENT	FAIL	INADEQUATE	SATISFACTORY	STRONG	EXCELLENT
Score	0 point	1 point	2 points	3 points	4 points
Compliance and Privacy	No details provided to identify whether firm complies with standards/PA etc.	Does not comply with requirements; minimal knowledge of personal information, privacy policies	Falls short of meeting basic requirements and may provide explanation in general terms.	Complies with requirements at an average level; privacy policy and practices are present and explained;	Complies with all requirements at an above average level with details; responses meet EDC's needs

		and practices within firm; responses are below average with little explanation regarding noncompliance; no implementation plan present to ensure the protection of personal information.		explanation regarding noncompliance, implementation plan in place in order to improve compliance.	and align with current programs and privacy policies.
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Calculation of rated requirements score

The final rated requirements score for each Proponent will be calculated as follows:

$$\text{Rated Requirement Score} = \left(\frac{\text{Total Proponent project experience score}}{\text{Maximum project experience score (27)}} * 40 \right) + \left(\frac{\text{Total Proponent resource resume score}}{\text{Maximum resource resume score (15)}} * 25 \right) + \left(\frac{\text{Total Proponent Security and Privacy score}}{\text{Maximum Security and Privacy score (4)}} * 5 \right)$$

APPENDIX E – RESOURCE CATEGORY

RESOURCE CATEGORY	CRITERIA
Product Owner	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum 1-3 years as a dedicated Product Owner role. • Intermediate knowledge of the Agile principles and the Scrum Framework. • Experience working in financial services, banking or insurance industries. • Experience in software development. • Certified Scrum Product Owner (CSPO). • Awareness and experience with widely successful Agile techniques: User Stories, ATDD, TDD, Continuous Integration, Continuous Testing, Pairing, Automated Testing. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
Scrum Master	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum four (4) years as a dedicated Scrum Master. • Scrum Alliance or SAFe certification. • Awareness and experience with widely successful Agile techniques: User Stories, ATDD, TDD, Continuous Integration, Continuous Testing, Pairing, Automated Testing. • Experience working in financial services, banking or insurance industries. • Experience in software development. • Ability to implement an organizational system that provides structure to the team. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
Data Architect	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years' experience in IT systems development or related experience. • Minimum four (4) years' experience in the designing and building data pipelines following software engineering concepts and best practices. • Advanced knowledge of IT systems development principles and practices. • Proven design build and implementation of batch and real-time data pipelines. Driven by automated repeatable delivery of data that aligns to enterprise data governance standards. • Experienced collaborator working with various stakeholders across the business, data scientists and IT. Working closely building relationships, refining data requirements to meet various data and analytics initiatives and data consumption requirements. • Demonstrated experience in delivering foundational systems for digital transformation initiatives. • Experience ensuring the proposed design optimally addresses access and query patterns; data consumption and adheres to internal architecture standards. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
Data Engineer	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years' experience in IT systems development or related experience.

	<ul style="list-style-type: none"> • Minimum four (4) years’ experience in the designing and building data pipelines following software engineering concepts and best practices. • Advanced knowledge of IT systems development principles and practices. • Proven design build and implementation of batch and real-time data pipelines. Driven by automated repeatable delivery of data that aligns to enterprise data governance standards. • Experienced collaborator working with various stakeholders across the business, data scientists and IT. Working closely building relationships, refining data requirements to meet various data and analytics initiatives and data consumption requirements. • Experience in developing and proposing data models that conform to requirements. • Experience ensuring the proposed design optimally addresses access and query patterns; data consumption and adheres to internal architecture standards. • Experience working with modern data processing technology stacks: Spark, Hive. • Programming experience in Spark using modern languages such as Scala, Java and/or Python. • Experience working with streaming data architecture and technologies for real-time: Spark Streaming, Kafka, Flink, Storm • Experience working with relational and non-relational database technologies: SQL Server, Synapse Oracle, Cassandra, MongoDB, CosmosDB, HBase . • Experience working with cloud data platform technologies: Azure Data Lake Store, Azure Databricks, Delta Lake, Azure Synapse and Azure EventHub. • Experience working with source code and configuration management environments such as Azure DevOps, Git, Maven, Nexus. • Understanding of agile development methods including core values, guiding principles, and key agile practices. • Understanding of the theory and application of Continuous Integration/Delivery. <p>Education: Undergraduate degree in Computer Science, Management Information Systems, or in a related field.</p>
Data Analyst	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum ten (10) years of broad experience in IM/IT solution design and delivery, including working knowledge with infrastructure, database platform, middleware and applications. • Minimum seven (7) years in architecting and modeling large-scale enterprise applications, designing OLTP, OLAP, BI and ETL solutions leveraging multiple DBMS technologies (MS SQL Server, Oracle, Access Database etc.), in addition to strong MS Excel skills. • Well-rounded experience in the whole data lifecycle management and hands-on experience in the following data management domains: dimensional and relational data modeling, data quality, SQL programming, ETL development, metadata management and master data management, business intelligence and database administration. • Strong analytical skills with the ability to collect, organize, analyze, and disseminate significant amounts of information with attention to detail and accuracy. • Collecting, documenting, and analyzing information management requirements. • Good understanding and practical implementation experience with integration design patterns. Strong understanding of Data Management Body of Knowledge is a plus. • Excellent verbal and written communication, critical thinking, time management, priority planning and interpersonal skills. <p>Education: Four (4) year bachelor’s degree in Computer Science, Information Systems, or related degree.</p>
Sr. ETL Developer	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum 7 years’ experience in IT systems development or related experience.

	<ul style="list-style-type: none"> • Experience with IBMs ETL tool, IBM InfoSphere DataStage. • Experience with IBM Cognos Business Intelligence Technologies (Cognos Analytics, Framework Manager, Transformer). • Experience with SQL Server Relational data base concepts and design. • Experience with technical testing techniques and tools. • Advanced knowledge of IT systems development principles and practices. • Knowledge of logical and physical data modeling. • Ability to translate business questions and requirements into technical solutions. • Knowledge of dimensional data warehousing concepts and modeling. <p>Education: Completed an Undergraduate Degree in Computer Science or Management Information Systems or an equivalent combination of relevant education and work experience.</p>
Data Scientist	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Experience using statistical computer languages (R, Python, BASE SAS, etc.) to manipulate data and draw insights from large data sets. • Knowledge of a variety of machine learning techniques (clustering, decision tree learning, artificial neural networks, etc.) and their real-world advantages/drawbacks. • Knowledge of advanced statistical techniques and concepts (regression, properties of distributions, statistical tests and proper usage, etc.) and their application. • Experience building and deploying predictive models, web scrapping, and scalable data pipelines. • Experience in model evaluation and validation. • Experience in model monitoring. • Technical knowledge of SQL, No-SQL database management systems. • Technical experience with data and analytics technologies such as SAS Viya, Databricks, PowerBI, Denodo, Azure Synapse, Azure ML. • Knowledge of MLOps methods and practices. • Experience in agile delivery methodology and tools. <p>Education: Completed a Post Graduate Degree, preferably a master’s degree, from top-tier college/university in Computer Science, Statistics, Economics, or other closely related field.</p>
Data Quality Analyst	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum five (5) years' experience in data analysis. • Proficiency in programming languages, including Structured Query Language (SQL) and JavaScript. • In-depth knowledge of statistical methods and tests. • Experience with Data Quality, Data Catalog and BI and Analytics tools. • Exceptional statistical and analytical skills. • Advanced problem-solving skills. • Advanced knowledge of information management principles and practices. <p>Education: Bachelor's degree in statistics, mathematics, computer science, information management, or similar.</p>
MDM Product Owner	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum 1-3 years as a dedicated Product Owner role, including working knowledge of role for multi-domain MDM • Minimum one (1) year of experience in Product Management and/or Product Development

	<ul style="list-style-type: none"> • Intermediate knowledge of the Agile principles and the Scrum Framework and the responsibilities of a Product Owner. • Established background in launching software or services in partnership with engineering teams and high degree of proficiency in prototyping, iterative development, understanding of Agile principles • Experience working in financial services, banking or insurance industries. • Experience in software development. • Certified Scrum Product Owner (CSPO). • Awareness and experience with widely successful Agile techniques: User Stories, ATDD, TDD, Continuous Integration, Continuous Testing, Pairing, Automated Testing. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
<p>MDM Program Manager</p>	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years’ experience delivering Master Data Management service solutions or related experience, including working knowledge of multi-domain MDM • PgMP certification or similar. • Awareness and experience with successful Agile techniques: User Stories, ATDD, TDD, Continuous Integration, Continuous Testing, Pairing, Automated Testing. • Experience working in financial services, banking or insurance industries. • Proven experience successfully delivering master data management (MDM) initiatives in one or of the following implementation styles: consolidation, registry, centralized and coexistence or combination styles. • Proven experience successfully delivering master data management (MDM) initiatives that start with one style and evolve to others. • Advanced knowledge of IT systems delivery principles and practices. • Advanced knowledge of Agile Program Management. • Advanced knowledge of MDM System Delivery. • Demonstrated experience in Legacy MDM System decommissioning and data migration. • Demonstrated experience in delivering foundational systems for digital transformation initiatives. • Demonstrated experience in delivering MDM initiatives on cloud platforms preferably MS Azure. <p>Education: Bachelor's degree in statistics, mathematics, computer science, information management, or similar.</p>
<p>MDM Scrum Master</p>	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum four (4) years as a dedicated Scrum Master. • Four (4) years of product or project development experience, or 3 years of project development experience on an Agile Team or an equivalent combination of education and work experience • Intermediate knowledge of the Agile principles and the Scrum Framework and the responsibilities of a Scrum Master • Scrum Alliance or SAFe certification. • Awareness and experience with widely successful Agile techniques: User Stories, ATDD, TDD, Continuous Integration, Continuous Testing, Pairing, Automated Testing. • Experience working in financial services, banking or insurance industries. • Ability to implement an organizational system that provides structure to the team. • Proven experience successfully delivering master data management (MDM) systems in one or of the following implementation styles: consolidation, registry, centralized and coexistence or combination styles.

	<ul style="list-style-type: none"> • Proven experience successfully delivering master data management (MDM) systems that start with one style and evolve to others. • Advanced knowledge of MDM System Delivery. • Demonstrated experience in Legacy MDM System decommissioning and data migration. • Demonstrated experience in delivering foundational systems for digital transformation initiatives. • Demonstrated experience in delivering MDM initiatives on cloud platforms preferably MS Azure. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
MDM Solution Architect	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years’ experience delivering enterprise class Master Data Management service solutions or related experience. • MDM system technical design for FI, Banking and Insurance Industries using SaaS or PaaS cloud design patterns on Azure Cloud Platform. • Advanced knowledge of MDM System Architecture design patterns for cloud platforms. • Demonstrated experience successfully designing master data management (MDM) system architectures in one or of the following implementation styles: consolidation, registry, centralized and coexistence or combination styles. • Demonstrated experience successfully master data management (MDM) system architectures that start with one style and evolve to others. • Demonstrated experience in designing MDM solution architecture that minimize the impacts of legacy system MDM System technology debt for decommissioning and data migration. • Experience collaborating with various stakeholders across the lines of business, data scientists and IT. Working closely building relationships, refining solution design requirements to ensure the MDM system will meet the various business and analytics initiatives data consumption requirements. • Experience in developing and proposing MDM system architecture design documents that conform to EDC architecture practice requirements. • Demonstrated experience in delivering foundational systems for digital transformation initiatives. • Demonstrated experience in delivering MDM systems on cloud platforms preferably MS Azure. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
MDM Data Architect	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years’ experience in IT systems development or related experience. • Minimum four (4) years’ experience in the designing and building data pipelines following software engineering concepts and best practices. • Advanced knowledge of IT systems development principles and practices. • Multi-domain MDM data architecture design, data models, and data hierarchies for FI, Banking and Insurance Industries using SaaS or PaaS cloud design patterns on Azure Cloud Platform. Centralized data model of the comprehensive master company profile. • Demonstrated experience successfully designing master data management (MDM) data architectures in one or of the following implementation styles: consolidation, registry, centralized and coexistence or combination styles. • Demonstrated experience successfully master data management (MDM) data architectures that start with one style and evolve to others.

	<ul style="list-style-type: none"> • Proven design build and implementation of batch and real-time data pipelines. Driven by automated repeatable delivery of data that aligns to enterprise data governance standards. • Experienced collaborator working with various stakeholders across the business, data scientists and IT. Working closely building relationships, refining data requirements to meet various data and analytics initiatives and data consumption requirements. • Experience in developing and proposing data models that conform to MDM implementation style requirements. • Experience in developing and proposing MDM system architecture design documents that conform to EDC architecture practice requirements. • Demonstrated experience in delivering foundational systems for digital transformation initiatives. • Demonstrated experience in delivering MDM system data architectures, data models, and data hierarchies on cloud platforms preferably MS Azure. • Experience ensuring the proposed design optimally addresses access and query patterns; data consumption and adheres to internal architecture standards. <p>Education: Completed an undergraduate Degree in Computer Science, Engineering, Commerce or Business Administration.</p>
MDM Data Engineer	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years’ experience in IT systems development or related experience. • Minimum four (4) years’ experience in the designing and building data pipelines following software engineering concepts and best practices. • Advanced knowledge of IT systems development principles and practices. • Demonstrated experience successfully designing master data management (MDM) data access, management, and storage SaaS or PaaS solutions for one or of the following implementation styles: consolidation, registry, centralized and coexistence or combination styles. • Demonstrated experience successfully master data management (MDM) data cloud data storage solutions that start with one style and evolve to others. • Experience with centralized data store design for a comprehensive master company profile. • Experienced collaborator working with various stakeholders across the business, data scientists and IT. Working closely building relationships, refining data requirements to meet various data and analytics initiatives and data consumption requirements. • Experience in developing and proposing data models that conform to MDM implementation style requirements. • Experience working with relational and non-relational database technologies: SQL Server, Synapse Oracle, Cassandra, MongoDB, CosmosDB, HBase. • Experience ensuring the proposed design optimally addresses access and query patterns; data consumption and adheres to internal architecture standards. • Experience working with cloud data platform technologies: Azure Data Lake Store, Azure Databricks, Delta Lake, Azure Synapse and Azure EventHub. • Experience working with source code and configuration management environments such as Azure DevOps, Git, Maven, Nexus. • Understanding of agile development methods including core values, guiding principles, and key agile practices. • Understanding of the theory and application of Continuous Integration/Delivery. <p>Education: Undergraduate degree in Computer Science, Management Information Systems, or in a related field.</p>
MDM Integration Analyst/Engineer	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p>

	<ul style="list-style-type: none"> • Minimum seven (7) years of broad experience in IM/IT solution design and delivery, including working knowledge with Application integration requiring the connection multiple independent systems, in complex ways with components of Azure Integration Services such as—API Management, Logic Apps, Service Bus, and Event Grid—to provide a complete solution for integrating both cloud and on-premises applications. • Minimum four (4) years’ experience in the designing and building data pipelines following software engineering concepts and best practices. • Advanced knowledge of IT systems development principles and practices. • Proven experience designing, building and implementing batch and real-time data integration pipelines for automated data access, orchestration, and synchronization of data that aligns to EDC enterprise information classification governance standards. • Experience ensuring the proposed design optimally addresses data access, orchestration, and synchronization the centralized comprehensive company profile. • Experienced collaborator working with various stakeholders across the business, IT Systems and Data & Analytics teams. Working closely building relationships, refining data requirements to meet various data and analytics initiatives and data consumption requirements. • Experience in developing and proposing integration patterns and solutions that conform to requirements. • Understanding of agile development methods including core values, guiding principles, and key agile practices. • Understanding of the theory and application of Continuous Integration/Delivery. <p>Education: Undergraduate degree in Computer Science, Management Information Systems, or in a related field</p>
MDM Data Analyst	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years of broad experience in IM/IT solution design and delivery, including working knowledge multi-domain MDM forensic data analysis across a complex and diverse application and system enterprise. • Well-rounded experience in the whole data lifecycle management and hands-on experience in the following data management domains: dimensional and relational data modeling, data quality, SQL programming, ETL development, metadata management and master data management, business intelligence and database administration. • Strong analytical skills with the ability to collect, organize, analyze, and disseminate significant amounts of information with attention to detail and accuracy. • Identification and documentation of data elements that comprise the comprehensive master company profile. • Collecting, documenting, and analyzing information management requirements. • Good understanding and practical implementation experience with integration design patterns. Strong understanding of DAMA Data Management Body of Knowledge is a plus. • Excellent verbal and written communication, critical thinking, time management, priority planning and interpersonal skills. • Experience working in financial services, banking or insurance industries. <p>Education: Four (4) year bachelor’s degree in Computer Science, Management Information Systems, or related degree.</p>
MDM DBA/Administrator	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years of broad experience in Multi-domain MDM IT service solution management data store administration and provisioning and management on Azure Cloud Platform. • Experienced in ensuring the performance of data-related components, including the security of the date and availability of the data in databases.

	<ul style="list-style-type: none"> Advanced knowledge of database security, backup and recovery, and performance monitoring standards <p>Education: Four (4) year bachelor’s degree in Computer Science, Management Information Systems, or related degree.</p>
MDM Systems Administrator	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> Minimum seven (7) years of broad experience in Multi-domain MDM IT service solution administration and management on Azure Cloud Platform. Experience with the configuration of a multi-domain MDM platform, data modeling, business rules and user experience. Experience managing the timely and accurate daily operational critical business process flows of the transmission and receipt of all inbound and outbound MDM transactions. Experience developing operating frameworks and procedures for delivery of assigned activities in conjunction with the MDM Lead. Strong identification, investigation and resolution skills for dealing with complex data issue and related concerns Experience actively participating in process improvement initiatives for multi-domain master data Experience working in financial services, banking or insurance industries. <p>Education: Four (4) year bachelor’s degree in Computer Science, Management Information Systems, or related degree.</p>
MDM Business Analyst	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> Minimum seven (7) years of broad experience in Multi-domain MDM service solution business analysis and requirements definitions. Experience leading and conducting requirement gathering process and sessions for documenting a Multi-domain MDM solution for FI, Banking and Insurance Industries using SaaS or PaaS cloud design patterns on Azure Cloud Platform. Familiarity with the concept of a comprehensive master company profile. Strong analytical skills with the ability to collect, organize, analyze, and disseminate significant amounts of information with attention to detail and accuracy. Identification and documentation of data elements that comprise the comprehensive master company profile. Collecting, documenting, and analyzing MDM solution information management requirements. Good understanding and practical implementation experience with integration design patterns. Excellent verbal and written communication, critical thinking, time management, priority planning and interpersonal skills. Experience working in financial services, banking or insurance industries. <p>Education: Four (4) year bachelor’s degree in Computer Science, Management Information Systems, or related degree.</p>
MDM Security Analyst	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> Experience with establishing security standards and protocols for master data management (MDM/RDM) Experience ensuring the company’s digital assets are protected from unauthorized access (cloud and on-premise infrastructures).

	<ul style="list-style-type: none"> • Able to go through metrics and data to filter out suspicious activity, find and mitigate risks before breaches occur and the root cause analysis. • Strong reporting skills in the efficacy and security policies put in place. • Experience recommending and implementing changes for a more secure network environment • Able to communicate and convey training and education to users on proper security protocols • Able to update and manage security systems documentation and information, including incident response and disaster recovery plans. • Conducting security assessments through vulnerability testing and risk analysis • Performing both internal and external security audits • Verifying the security of third-party vendors and collaborating with them to meet security requirements <p>Education: Four (4) year bachelor’s degree or equivalent in Computer Science, Management Information Systems, or related degree. Certification (CISSP) (CISM)</p>
Change/Communications Management Lead	<p>Experience: Contractors should demonstrate/describe their relevant experience, skills and knowledge in all the requirement areas.</p> <ul style="list-style-type: none"> • Minimum seven (7) years’ experience with large-scale organizational change efforts • Experience coaching, supervising and supporting project teams in integrating change management activities into their project plans. • A solid understanding of how people go through a change and the change process • Experience and knowledge of change management principles, methodologies and tools • Able to drive fast adoption, ultimate utilization and proficiency of the changes that impact employees in the organization to increase benefit realization, value creation, ROI and the achievement of results and outcomes. • Experience leading and ensuring change initiatives meet objectives on time and on by increasing employee adoption and usage. • Able to apply a structured methodology and lead change management activities, processes and tools to create a strategy to support adoption of the changes required by a project or initiative. • Experience in creating and implementing change management strategies and plans that maximize early adoption and minimize resistance. • Well versed in impact analysis, assessment of change readiness and identification of key stakeholders • Experience in the support design, development, delivery and management of change communications • Supported training efforts by providing input document requirements and support to the design and delivery of training programs. • Created actionable deliverables for the five change management levers: communications plan, sponsor roadmap, coaching plan, training plan, resistance management plan • Able to define and measure success metrics and monitor change progress • Familiarity with project management (Agile) approaches, tools and phases of the project lifecycle <p>Education: Four (4) year bachelor’s degree or equivalent in human resources and business administration, or organizational development. Accreditation in Change management or designation desired (e.g. CCMP) is a must.</p>
Business Analyst	<p>Experience:</p> <ul style="list-style-type: none"> • Minimum of three (3) years of demonstrated experience within the last ten (10) years in performing business analyses of functional requirements to identify information, procedures, and decision flows.

- Minimum of three (3) years of demonstrated experience within the last ten (10) years in defining interfaces of manual to automated operations within application subsystems.
- Minimum of three (3) years of demonstrated experience within the last ten (10) years in evaluating existing procedures and methods including identifying and documenting: database content, structure, application subsystems with the Software Languages and tools.

Education: A university degree in a related business or technology discipline; OR 2. A two-year college diploma in a related business or technology discipline and a minimum of 2 years of experience in a related business or technology discipline; OR 3. A university degree in any field and a minimum of five years in a related business or technology discipline.

APPENDIX F – INTERVIEW QUESTIONS

#	Question	Weight	Evaluation Criteria
1	Given your understanding of EDC’s Data Analytics needs, highlight the 2 or 3 services that you think would provide the most value to EDC.	25%	<p>3 = Full, Proponent has highlighted 2 to 3 services that align to EDC priorities. Provided concise, effective and practical information that demonstrates a solid understanding of EDC’s data analytics needs.</p> <p>2 = Partial, Proponent has highlighted 2 to 3 services. Provided adequate information that demonstrates some understanding of EDC’s data analytics needs.</p> <p>1 = Unsatisfactory, Proponent has not highlighted 2 to 3 services. Insufficient information to assess their understanding of EDC’s data analytics needs.</p> <p>0 = No response, Proponent has not responded to this question.</p>
2	Highlight the main risks you believe we will be facing and how best to mitigate them.	25%	<p>3 = Full, Proponent has identified a minimum of one high priority risk that aligns to EDC internal risk assessment. Outlined practical mitigation activities fully addressing each risk identified. Demonstrated a solid understanding of the environment and related risk factors.</p> <p>2 = Partial, Proponent has outlined practical mitigation activities addressing each risk identified. Demonstrated some understanding of the environment and related risk factors.</p> <p>1 = Unsatisfactory, Proponent has not outlined mitigation activities addressing each risk identified. Insufficient information to assess their understanding of the environment and related risk factors.</p> <p>0 = No response, Proponent has not responded to this question.</p>
3	Provide your perspective on how you would work with EDC to deliver a work package in the subsequent contract phase. At a minimum, you are expected to include a summary of your understanding of the work package scope and requirements, a project plan, your proposed resource mix, and any risks and issues you foresee in the execution of the sample work package. <i>[Sample work package details will be provided to Proponents when they are invited to participate in an interview.]</i>	25%	<p>3 = Full, Proponent has demonstrated an approach to working with EDC that displays a strong understanding of the sample work package scope and requirements. Provided a project plan and resource mix that addresses all sample work package requirements, and highlighted risks and issues of high relevance.</p> <p>2 = Partial, Proponent has demonstrated an approach to working with EDC that an understanding of the sample work package scope and requirements. Provided a project plan and resource mix that addresses some sample work package requirements, and highlighted risks and issues of moderate relevance.</p> <p>1 = Unsatisfactory, Proponent has demonstrated an approach to working with EDC that displays limited understanding of the sample work package scope and requirements. Provided a project plan and resource mix that does not address sample work package requirements, and highlighted risks and issues of limited or no relevance.</p> <p>0 = No response, Proponent has not responded to this question.</p>
4	What differentiates you from your peers and shows us that you’re the best firm to help us in this transformation?	25%	<p>3 = Full, Proponent has highlighted several key points of differentiation. Provided concise, effective and practical information that demonstrates market leadership in the Data Analytics space.</p> <p>2 = Partial, Proponent has highlighted some key points of differentiation. Provided adequate information that demonstrates competency in the Data Analytics space.</p> <p>1 = Unsatisfactory, Proponent has not highlighted key points of differentiation. Insufficient information to assess understanding of the Data Analytics space.</p> <p>0 = No response, Proponent has not responded to this question.</p>

