

# REQUEST FOR PROPOSALS

RFP-INVEST OTTAWA-2021-EDR

## **OTTAWA KNOWLEDGE-BASED INDUSTRIES ECONOMIC DATA REFRESH PROJECT**

**Deadline for Full Proposals: December 3rd, 2021 at 5:00 PM EST**



# I. Table of Contents

- I. **Table of Contents** ..... 2
- II. **Background** ..... 4
- III. **Project Objectives** ..... 4
  - A. Phase One ..... 4
  - B. Phase Two (Optional) ..... 5
  - C. Phase Three (Optional)..... 5
- IV. **Project Timelines** ..... 5
- V. **Scope of Work (Phase One)** ..... 5
  - A. Data Model ..... 5
  - B. Refresh Methodology ..... 6
  - C. Data Sources and Inclusion Methodology ..... 6
  - D. Data Set ..... 6
  - E. Description of Deliverables ..... 6
  - F. Budget (Phase One) ..... 7
- VI. **Scope of Work (Phase Two – Optional)** ..... 7
  - A. Data Visualization/Dashboard ..... 7
  - B. Ottawa Heartbeat ..... 7
  - C. Budget (Phase Two) ..... 7
- VII. **Optional Scope of Work (Phase Three – Exploratory)** ..... 7
  - A. DEI Data and Methodology ..... 7
- VIII. **Proposal Components** ..... 8
  - B. Company Profile ..... 8
  - C. Phase One: Data Model, Methodology, and Sources ..... 8
  - D. Optional Phase Two: Data Visualization/Heartbeat ..... 9
  - E. Exploratory Phase Three: DEI Data and Methodology ..... 9
  - F. Work Plan and Timeline ..... 9
  - G. Pricing ..... 9
  - H. References ..... 10
- IX. **Evaluation Process** ..... 10
- X. **Ranked Criteria for Proposal Evaluation** ..... 10

XI. **Submission Guidelines** ..... 11

XII. **Request for Debrief** ..... 11

XIII. **Conflict of Interest** ..... 11

## II. Background

Invest Ottawa (IO) is the lead economic development agency for knowledge-based industries in Canada's Capital, facilitating economic growth and job creation in the city of Ottawa. Guided by a vision to help realize Ottawa's full potential as a globally recognized, innovative and future-ready city, and the best place to learn, work, live, and play, Invest Ottawa delivers venture development and global expansion programs and services that catalyze the growth and success of entrepreneurs and firms. These include: small business training; mentorship; acceleration for technology firms; foreign business and investment attraction; local business retention and expansion in targeted sectors; commercialization; and marketing Ottawa's diversified economy and high quality of life.

Invest Ottawa relies heavily on data about the city of Ottawa to fulfill its programming objectives, understand and analyze the economic and labour markets, and demonstrate to companies and talent why Ottawa is a prime location to build/scale a business and live/work. The data Invest Ottawa currently uses was collected several years ago and was collected via a manual approach – individuals contacting ICT and life science businesses in the city, one-by-one. While this approach was reliable, it is neither sustainable nor scalable. Thus, Invest Ottawa, with support from the City of Ottawa's Economic Development and Long-Range Planning Branch, is seeking a firm to develop a data model that pulls data from credible, reliable, publicly available and/or subscription-based sources (as appropriate) featuring knowledge-based industries (including but not limited to ICT and life science industries) data and a sound methodology that supports cross-dataset calculations and comparisons to support our work.

## III. Project Objectives

Invest Ottawa is seeking a 'Proponent' firm with extensive experience and expertise in building datasets and data models, to deliver the following:

### A. Phase One

- Data on Ottawa's knowledge-based industries including and describing, as feasible:
  - Ottawa's total tech ecosystem including number of people employed, number of firms, locations, key sector and subsector breakdowns, and corporate family trees;
  - Talent breakdowns and growth, including by area of skill and expertise, and median salaries by area of skill and expertise; unemployment rates;
  - Population and demographics data;
  - Real estate data (building permits, vacancy, rental rates, residential);
  - Post-secondary output by technology programs, including enrollments and graduations;
  - Potential benchmarking/comparison with other relevant/comparable cities/regions; and,
  - Other data points as determined relevant through discovery sessions.
- A data model that permits cross-dataset calculations and comparisons, including an assessment of the data sources regarding their terms and conditions, reliability, credibility, sustainability, currency, and cost; and,
- A sustainable methodology that would permit Invest Ottawa to refresh and recalculate the results on an ongoing basis (ideally quarterly, dependent on the data sources).

## B. Phase Two (Optional)

Invest Ottawa wishes to take the data derived from the above and create visualizations, including Power BI dashboard(s) and a regular 'Heartbeat' on the economic position of Ottawa, among other possible reports from the resulting data. An example of the type of end product Invest Ottawa would look for is here: [Halifax Economic Dashboard](#).

## C. Phase Three (Optional)

Invest Ottawa wishes to explore what diversity, equity, and inclusion (DEI) and equitable economic growth data points on the city of Ottawa and its labour force could be collected, interpreted, and visualized as part of an exploratory (and optional) phase three of this project. This phase would require a well-researched and documented methodology to support the collection and interpretation of the data. This phase may look at certain sectors or take a broader approach, depending on the recommendations and data availability.

## IV. Project Timelines

Request for Proposals (RFP) Issued	November 8 <sup>th</sup> , 2021
Deadline for Proposals	December 3 <sup>rd</sup> , 2021
Proposal Clarifications (if required)	By December 8 <sup>th</sup> , 2021
Decision on Winning Bid	On or before December 13 <sup>th</sup> , 2021
Executed Contract	December 17 <sup>th</sup> , 2021
Project Completion	On or before May 31 <sup>st</sup> , 2022

The intention is to award a contract for this project (for Phase One and possibly for Phase Two; Phase Three will not be awarded through this process). This RFP does not obligate Invest Ottawa to accept any bid. Invest Ottawa maintains the right to reject any or all proposals. Submissions that do not meet the mandatory criteria will be disqualified. Submissions that are delivered after the closing time will not be reviewed. Invest Ottawa may at their sole discretion, invite one or more Proponents for an interview, presentation or request further clarification to address any questions or clarifications relating to Proposals (see Proposal Clarifications above).

## V. Scope of Work (Phase One)

Phase One of this project is outlined below and comprises the core requirements for the RFP process.

### A. Data Model

- The Proponent will build an open-ended data model that will allow Invest Ottawa to update and refresh the model on an ongoing basis. The data model will include:
  - Entity relationship diagrams
  - Data dictionary for each table and attributes
  - Source dimensions, classifications and equivalencies
  - Metric definitions and granular limitations

- Workforce size metrics as # of full-time employees with ability to break down into:
  - ICT and life sciences sectors
  - Technical skillsets such as software developers, hardware developers, quality assurance, engineering managers, cloud developers, etc.
- Ecosystem size metrics as # of firms with ability to break down into:
  - ICT and life sciences sectors
  - Urban vs suburban vs rural areas and local workforce estimates
- Time-series based forecasting and analysis including the ability to compare metrics across two or more points in time
- The data model must be designed in such a way that it can be refreshed on demand by the end user using prescribed instructions and executing requisite data translations

## B. Refresh Methodology

- The Proponent will build documented procedures to support a sustainable methodology for end users to be able to:
  - Import and update each data sources' raw datasets
  - Add a classification to each dimension
  - Post-refresh validation and error handling
- The documented methodology must also include scripts to effect data translations and installation/runtime instructions for those scripts

## C. Data Sources and Inclusion Methodology

- The Proponent will assess/recommend data sources in considering their terms and conditions, reliability, credibility (widely recognized by economic development community), sustainability, currency, and cost
- The Proponent will develop an inclusion methodology of how to classify companies into sectors (and recommend the sectors to include under ICT and life sciences) that maps back to 6-digit NAICS

## D. Data Set

- The Proponent will provide a complete data set employing the data model, methodology and data sources listed in the Scope of Work A-C
- The data set should employ the most recent data possible

## E. Description of Deliverables

- Complete data set for most recent data possible (2020 or 2021 preferred)
- List of recommended data sources based on their terms and conditions, reliability, credibility, sustainability, and cost (including annual license fees, if applicable)
- Inclusion methodology for sectors definitions (classifications), inclusion/exclusion from data set, and mapping to 6-digit NAICS
- Data model (tables, keys, rows & columns); the format and structure to be proposed and mutually agreed upon but must be external to Power BI while compatible as a data source
- Refresh methodology (from data sources to data model import, a step-by-step written guide)
- Translation scripts (if required, to convert or prepare data source into raw data to be model-ready)

- Use cases for how the data model can be leveraged linking to the Objectives section of this document
- Demonstration session(s) and/or training for relevant Invest Ottawa staff
- Recommendations on benchmarking to other comparable cities/regions
- Methodological notes and a statement that can be used for public-facing documents confirming that the methodology was developed by the Proponent

## F. Budget (Phase One)

- Phase One projects cannot exceed \$60,000-\$88,500 + HST. This does not include any identified license fees to access the data.

## VI. Scope of Work (Phase Two – Optional)

Phase Two of this project is outlined below and comprises optional requirements for the RFP process, should the Proponent have the necessary skills and expertise to deliver on these optional requirements.

### A. Data Visualization/Dashboard

- The Proponent will create a PowerBI dashboard that visualizes the data in a compelling and visually pleasing way, that helps to tell the story of Ottawa as outlined in the Background section (example: [Halifax Economic Dashboard](#))

### B. Ottawa Heartbeat

- The Proponent will create an 'Ottawa Heartbeat' template (infographic, visual report, or other visual concept) to facilitate sharing a snapshot of the economic picture with stakeholders on a regular basis (cadence dependent on frequency data updates)

### C. Budget (Phase Two)

- Phase Two projects cannot exceed \$10,000-\$30,000 + HST.

## VII. Optional Scope of Work (Phase Three – Exploratory)

Phase Three of this project is outlined below and comprises exploratory requirements for the RFP process, should the Proponent have the necessary skills and expertise to deliver on these optional requirements.

### A. DEI Data and Methodology

In this optional third phase, the Proponent would design an open-ended data model that would possibly allow Invest Ottawa to update and refresh the model on an ongoing basis, to demonstrate the Diversity, Equity and Inclusion data for the city of Ottawa.

Data points would include, but not be limited to:

- Wealth gap;
- Income gap;
- Entrepreneurship numbers;
- Job creation numbers;
- Access to capital/financial assistance;

broken down by the following diversity dimensions: Highest level of education, Racialized people (with breakdown categories) Black/African Heritage people, Indigenous people, people who are 2SLGBTQ+ identified people with disabilities, newcomers, women, neighbourhood of residency, socio-economic class background).

This phase will require the Proponent to develop a robust methodology on the collection and interpretation of secondary and possibly primary data.

## VIII. Proposal Components

Below is a list of the components that must be included in the full proposal. If any component is missing from the proposal, it will be disqualified. Proposals shall not exceed 15 pages, 12-point Arial font.

### B. Company Profile

Proponents shall provide a summary of their organization and describe the qualifications of the Proponent to deliver on the objectives of this project and conduct the scope of work proposed (links to LinkedIn biographies is encouraged and acceptable), including links to any papers/research demonstrating thought leadership in economic development data, if available.

This includes relevant expertise, knowledge, and previous experience of the Proponent, including two specific examples of similar projects the Proponent has undertaken that are similar in scope of work requested within this RFP. Please prioritize examples of working on similar projects with other Economic Development Agencies, if applicable (note this will not be a weighed requirement).

The Proponent should also identify the prime contact for all questions and clarifications related to the proposal.

### C. Phase One: Data Model, Methodology, and Sources

The proposal must include a detailed description of the data model to be built. This includes:

- How the proposed data model will directly address the objectives of this project, outlined in the 'Background' and 'Scope of Work' sections above, including defined deliverables;
- How an assessment of any additional proposed data sources would be carried out and a preliminary list of sources to be consulted, including an assessment of their terms and conditions, reliability, credibility, sustainability, and cost; and,

- A detailed plan on establishing a robust methodology to allow Invest Ottawa to refresh and recalculate results on an ongoing basis.
- A description of the data set to be provided.

## D. Optional Phase Two: Data Visualization/Heartbeat

If the Proponent wishes to bid on the optional phase two, then the proposal should include a detailed description of the visualizations and marketing product(s) that could be produced, with at least 2 mockups/concepts/examples from previous projects included. This portion of the Proposal will be evaluated separately from Phase One. Proponents that only bid on Phase One will not be penalized in the evaluation process.

## E. Exploratory Phase Three: DEI Data and Methodology

This section will not be evaluated under the current proposal process but would be used to identify possible Proponents for a third phase of the project (contracts not to be awarded at this time). If the Proponent would like to be considered for an optional Phase Three solicited proposal process, then the Proponent shall describe in the proposal the following:

- Level of effort required to fulfill the scope of work as described in section VII of this document;
- Potential methodological approaches and assessment of data sources;
- Estimated cost; and,
- Overall approach.

## F. Work Plan and Timeline

The proposal must include a work plan that outlines:

- The milestones with dates, activities, deliverables, and outcomes at each step or phase of the engagement
- How key activities and milestones will be achieved: process and approach
- The project team members and external stakeholders to be engaged at each milestone/deliverable

## G. Pricing

Proponents shall provide a detailed outline of pricing for the project (Phase One only), based on a fixed price model, including specification of level of effort (breakdown of hours for a team by staff level), a payment schedule that ties to milestones outlined in Section C above. The pricing shall exclude any recurring annual license costs for data sources.

**Optional:** If the Proponent will bid on Phase Two, a separate pricing outline is required.

## H. References

Please provide corporate references for at least two (2) projects undertaken that are similar in scope and complexity to the project described in this RFP completed in the last 3 years. References should be senior individuals with accountability for the overall project and its outcomes, and who can speak directly to their experience with the Proponent, and associated performance on the project. Each reference must include the name, title, address, telephone number and email address.

## IX. Evaluation Process

Invest Ottawa will assemble an evaluation team to support the assessment and ranking of proposals in accordance with the criteria defined in this RFP, and the selection of a recommended Proponent. Note that our proposal evaluation committee may include a representative from The City of Ottawa's Economic Development and Long-Range Planning Branch.

## X. Ranked Criteria for Proposal Evaluation

Proposals will be evaluated based on the ranked criteria below:

Proposal Component	Points	Score
<b>A. Company Profile</b> <ul style="list-style-type: none"> <li>Demonstrates appropriate qualifications – 5 points</li> <li>Shows thought leadership – 5 points</li> <li>Provides two examples of past projects – 10 points</li> </ul>	20	
<b>B. Data Model, Methodology, and Sources (Phase One)</b> <ul style="list-style-type: none"> <li>Addresses objectives of project – 15 points</li> <li>Shows understanding of data sources – 10 points</li> <li>Demonstrates ability to develop robust methodology – 15 points</li> <li>Demonstrates understanding of the data set to be provided – 10 points</li> </ul>	50	
<b>C. Data Visualization/Heartbeat (Optional Phase Two)</b> <ul style="list-style-type: none"> <li>Addresses objectives of project – 10 points</li> <li>Provides two examples/mockups/concepts – 20 points</li> </ul>	30	
<b>D. Work Plan and Timeline</b> <ul style="list-style-type: none"> <li>Work plan is achievable and aligns with IO's timelines – 10 points</li> </ul>	10	
<b>E. Pricing</b> <ul style="list-style-type: none"> <li>Uses fixed price model – 5 points</li> <li>Fits within budget – 10 points</li> </ul>	15	
<b>F. References</b> <ul style="list-style-type: none"> <li>Provides 2 references – 2 points</li> <li>Positive reviews – 10 points</li> </ul>	12	
<b>Total Points Available – Phase One</b>	<b>107</b>	
<b>Total Points Available – Optional Phase Two</b>	<b>30</b>	
<b>Total Score</b>		

In the event of a tie during the evaluation, the tied proponents will be invited to a virtual interview in an effort to break the tie. The interview will have a set agenda and will be scored by the evaluation team.

## XI. Submission Guidelines

All responses to this RFP must be submitted via email to Marie Ainsworth at [mainsworth@investottawa.ca](mailto:mainsworth@investottawa.ca) by December 3<sup>rd</sup>, 2021 at 5:00PM EST.

## XII. Request for Debrief

At the conclusion of this RFP process, all Proponents will be notified. Upon request, unsuccessful Proponent(s) may request a de-brief regarding their Submission within (30) days of notification.

## XIII. Conflict of Interest

Invest Ottawa is a not-for-profit organization that fully complies with the Broader Public Sector Procurement Directive established by the Government of Ontario.

To ensure unbiased objectivity, it is essential that all proponents are arms-length from Invest Ottawa and the Innovation Centre at Bayview Yards. Proponents must declare any actual, potential (or perceived) conflicts of interest. Where a conflict of interest arises, it shall be evaluated, and an appropriate mitigating action will be taken.