

Calgary Regional Partnership (CRP)

REQUEST FOR PROPOSAL (“RFP”)

FOR

**Development of a
Strategic Plan and Implementation Framework
for Delivery of CRP's GIS Program**

CLOSING DATE: 2010, September 15, 4:30 PM MDT

27 August 2010

DETAILS OF REQUEST FOR PROPOSAL (RFP)

Development of a Strategic Plan and Implementation Framework for Delivery of the Calgary Regional Partnership's GIS Program in the Calgary Region

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1. INTRODUCTION

The purpose of this RFP is to select a qualified Consultant, with GIS experience at the regional / metropolitan scale, who will assist the Calgary Regional Partnership (CRP) in developing a Strategic Plan and Implementation Framework for the delivery of CRP's GIS (Geographical Information System) program.

This RFP is being sent to a pre-selected list of consultants and will be posted on a publicly accessible website to invite all potential candidate proposals. Proposals are to be submitted electronically only by **2010 September 15, 4:30 PM MDT** to the email address noted in Section 9 below.

2. PROJECT BACKGROUND

The Calgary Regional Partnership (CRP) started in 1999 as a loose network of municipalities working together voluntarily on projects of mutual interest. In 2006, ten years after regional planning had been disbanded in Alberta, and after experiencing another period of sustained growth, municipal leaders voluntarily agreed to work together to address the tough regional growth issues. Over a period of three years, the municipalities developed a plan for the growth of the region over a 60 to 70 year horizon. During this same period, the Provincial Government approved its *Provincial Land Use Framework* which mandated that a Calgary metropolitan plan be completed as part of a broader *South Saskatchewan Regional Plan*. This plan, the *Calgary Metropolitan Plan (CMP)*, was approved by a majority of the members at a General meeting of the CRP on June 19, 2009. The CRP has now submitted the CMP to the Province of Alberta for approval. Once Provincial approval of the CMP has been received, full implementation of the Plan can begin. In the meantime, CRP is beginning an aggressive implementation program focused on catalyst projects to create a stronger foundation for CRP activities.

It is becoming increasingly apparent in our region that GIS - the collection and dissemination of digital spatial information, mapping and spatial analysis - is becoming a fundamental underpinning to virtually all aspects of the CRP's emerging mandate, including the implementation and further refinement of the *Calgary Metropolitan Plan (CMP)*.

Steps towards a more coordinated sharing of GIS-based information

In taking a more collaborative approach to planning for the Calgary region, member municipalities recognized the common benefits that could be generated through a coordinated effort to share spatial data and better align municipal GIS-based applications and data standards, planning and information on a regional scale to:

1. share and provide stakeholders with timely access to information for better-informed decision-making
2. ensure that required information is available to stakeholders for engagement and planning purposes

Over the past four years, CRP and its member municipalities have focused their efforts to create a number of significant deliverables, including:

- data sharing agreements among CRP members and with third parties
- sharing of GIS approaches and experiences, working toward identification and implementation of best practices at regional and sub-regional scales
- professional development, including informal information sharing, surveys to reconcile differences in corporate organization, technical capacity, needs assessments, etc.
- actions to begin standardizing GIS data and methodological approaches to the creation, updating and dissemination of information
- exploration of options for pooling resources to save on the cost of data required across jurisdictional boundaries (e.g. orthoimagery).
- regional data inventory and initial metadata
- Data Framework - a GIS "portal" for accessing available spatial data from member municipalities and other sources
- supporting tools, such as a web-based standalone metadata editor and a metadata entry form for ESRI ArcGIS, customized to CRP metadata standard

GIS-based development of the *Calgary Metropolitan Plan (CMP)*

In recent years, CRP undertook to create a comprehensive land use and servicing plan for the entire region - the *Calgary Metropolitan Plan (CMP)*. To support that planning effort over the past four years, CRP engaged the City of Calgary and environmental planning consultants to create a regional GIS capacity (data and analysis). Planning analysis undertaken for the CMP incorporated available spatial data related to land use, soils, hydrology, ecosystems and habitats, infrastructure, socio/demographic data, parcel base, roadnet, satellite imagery and other data types. Specific methodologies and tools were created for analysing and visualizing the region's ecological landscape, servicing areas, population and job growth scenarios, making use of a variety of specific GIS-based tools. The components of the consultant's GIS-based analysis, as well as the input and derived data, remain the property of CRP.

GIS integration to support CMP Implementation and regional GIS capacity

As CRP looks forward over the next 5 year period, it is clear that regional GIS capacity, in some form, can make a significant contribution to both the implementation of the CMP and ongoing regional planning, servicing, municipal and sub-regional planning efforts. There is tremendous potential for improved data creation, analysis and sharing in all areas of regional activity, including economic development, resource management, watershed, transportation planning, plan implementation and so on.

The challenge, and the opportunity, facing CRP at this stage is to be very strategic in assessing the range of needs and benefits of a more fully integrated regional information base and functional GIS capacity. It is essential that the path forward take full advantage of the work, information and processes created in both the operational and the planning GIS workstreams evolving over the past four years - two foundations to be

aligned and integrated into a purposeful, efficient regional GIS capacity for planning, implementation and day-to-day operational purposes.

In order to support implementation of a regional GIS capacity, it will be important for the CRP to address a wide array of implementation questions and issues. These questions include, but will not be limited to, the following:

- Who needs improved spatial information to support better planning at regional and sub-regional scales?
- What kinds of information do they need, and which needs are most critical to effective regional and sub-regional planning?
- How can GIS best be used to better create, manage and analyse information about various planning activities across the region (i.e. how to make best use of the maps, tools, information sharing, etc.)?
- What strategies should CRP and its partners pursue to most effectively get regional GIS information and tools into the hands of users and decision-makers?
- "Who does what" to meet these needs? What is the necessary governance, work streams and alignment of responsibilities needed to deliver an adaptable GIS system for the region?
- How do we best ensure that redundancies are identified and minimized?
- What is the appropriate sequence of work and deliverables to implement our GIS Strategic Plan over the next 5 years?
- What are the financial, technical and staffing requirements to successfully deliver an effective regional GIS program over the next 5 year period, and what will it cost to do it properly?

Regional GIS as a regional priority and "catalyst" project area

In June 2010, CRP approved *Moving Forward Together*, a strategic action plan and budget to support CMP implementation and ongoing CRP programs through 2010 - 2011. Within that plan, the development and utilization of GIS capacity is identified as one of three priority and "catalyst" project areas for strategically initiating and integrating regional service delivery, infrastructure systems and land use planning.

Engaging a GIS consultant, with demonstrated successes in building GIS capacity at the regional / metropolitan level, to advise CRP by assessing and recommending a "way forward" in developing regional GIS capacity over the coming 5 year period, is a key action within the GIS workstream.

3. PROJECT SCOPE, DELIVERABLES, SCHEDULE

As identified in CRP's *Moving Forward Together* 2010 - 2011 Action Plan and budget, the scope of work for the successful Consultant includes, but is not limited to:

- Identifying stakeholders or users of GIS within the CRP;
- Identifying essential stakeholder needs, at regional and sub-regional scales of planning, for spatial information and GIS functionality;
- Completing a CRP-wide evaluation and prioritization of the needs for GIS products, services and tools;
- Review and assess the current state of staff, capital and technology resources; and
- Recommend strategies, requirements and a phased approach to deliver a regional GIS program over the coming 5 year period.

For clarity's sake, the following components are specifically NOT within the scope of this regional GIS strategic planning project:

- providing a detailed system architecture
- providing a detailed inventory of member municipalities' internal GIS applications or capacities
- providing a detailed set of common, standardized GIS concepts and terms, acceptable to all stakeholders
- creating a detailed data model of all data required to meet all needs

3.1 Project Deliverables

.1 Creation of a substantive GIS Strategic Plan to direct the Calgary Regional Partnership in enhancing and implementing a regional GIS program, including an assessment of risk and critical success factors for the Plan's delivery. Development of the Strategic Plan will include, but not be limited to:

- Assessment of the current CRP context and regional / sub-regional GIS capacity now in place
- Engage CRP staff, committee members and regional stakeholders in a GIS-focused needs/capacity assessment and feedback on Plan options / proposals
- Overview and comparative analysis of on-the-ground regional / metropolitan GIS systems in other regional jurisdictions, including the Edmonton Capital Region, providing an identification of "best practices", leading-edge approaches for regional GIS delivery, and an assessment of the pros & cons of different service delivery approaches
- Investigation of current and anticipated Provincial (Alberta) and Federal GIS-based initiatives that might offer benefits through their alignment with a regional GIS system
- Development and recommendation of a Vision, Mission Statement, Guiding Principles and Strategic Goals as a basis for development of an ongoing GIS capacity in the Calgary region

- Recommended strategies to expand and integrate GIS capacity and delivery at regional and sub-regional scales, including recommended components, service delivery approaches, staffing and oversight (governance) mechanisms

.2 Development of a detailed Implementation Framework to deliver, through a staged multi-year program, all elements of the GIS Strategic Plan.

3.2 Project Schedule

September 15 - Deadline for receipt of proposals from invitees; GIS Team begins evaluation of candidates and creates short-list for interviews

October 11 - 14 - Interviews with GIS Team at Cochrane Ranchehouse. Selected interviewees will respond to questions, be invited to present a 20 - 30 minute overview of their experience and proposal, and respond to a continued question and answer period.

October - Recommended Consultant proposed to CRP Committees

Early November - Contract Awarded; background analysis and stakeholder interviews begin

Early December - Consultant organizes a "needs synthesis" workshop (#1) with regional GIS stakeholders including, possibly, experts from selected regions having exemplary GIS systems in place

Mid-January - Consultant organizes stakeholder workshop #2 to review Consultant's PRELIMINARY GIS Plan and Implementation Framework findings and proposals

Early-February - Consultant presents DRAFT GIS Plan and Framework to joint meeting of Integration and Implementation Committee and RGIS Committee; Committees provide feedback and identify outstanding issues and questions

Late-February - Consultant presents PROPOSED GIS Plan and Implementation Framework to joint meeting of I&I and RGIS Committees

Mid-March - I&I and RGIS Committees submit their recommendations to Executive Committee for approval

CRP will make available all previous CRP studies, needs assessments and resource materials to the selected Consultant at the project's commencement.

4. REPORTING REQUIREMENTS AND PROCEDURES OF THE PROJECT

A GIS Team, comprised of a staff member from each of the I&I, RGIS, Transportation, Servicing and Economic Development staff committees will be assembled to administer this project, under the direction of CRP staff. The successful Consultant must communicate and report on the project status to the CRP project manager, Bob Miller, a

minimum of once every week for the duration of the project. Close collaboration between the successful Consultant and GIS Team is expected and required throughout the project.

In addition to the above, project meetings will be held on an as-needed basis to be defined at the start of the project. The successful Consultant will be required to submit written project updates as required by the project manager.

Staff changes by the successful Consultant will require approval from CRP prior to any such change. The qualifications and experience of the proposed staff must be equivalent to or better than the staff proposed at the proposal phase. Failure to comply may result in the termination of the assignment.

5. PROPOSAL SUBMISSION REQUIREMENTS

5.1 Intent and Format

- .1 Your firm is invited to submit a written Proposal in letter format, of not more than fifteen (15) pages. Appendices, organizational charts and personnel resumes are not to be considered in the number of pages.
- .2 We are looking for evidence that the Proponent has the regional / metropolitan experience, expertise and capability to successfully complete this project; and that the Proponent is providing good value for money. Any relevant information that you provide to demonstrate this will be considered and assist us in our selection process.
- .3 Only candidates with demonstrated experience in developing GIS systems / capacity at a regional / metropolitan scale will be considered for an interview.

5.2 Multi-firm Proposals :

If the application is submitted as a multi-firm proposal, the proposal shall:

- .1 Demonstrate the extent to which the proposed Firms have worked together before, including a description of the type of work.
- .2 Identify those project team members, from each organization, that have worked together in a multi-firm or consortium business arrangement.
- .3 Provide examples of where they have successfully partnered in a similar type engagement previously.
- .4 Demonstrate a multi-firm management approach that will ensure, for the duration of the project, clear lines of communication and delivery of services.
- .5 Identify management, ownership and financial and legal relationships between the consortium members.

- .6 Indicate how the consortium is proposing to contract with CRP to ensure a single point of accountability for project completion and dispute resolution.
- .7 Identify which firm will be designated as the Lead Consultant.
- .8 Define the scope of work to be performed by each Firm.

6. EVALUATION CRITERIA

6.1 General & "Value for Money"

- .1 The successful proponent must be prepared to sign a Master Consultants Agreement (MCA). In addition, the Consultant's proposal under this RFP will form part of that MCA.
- .2 Describe the principal business of the firm.
- .3 Identify the office location and the ability to provide services for the Calgary region.
- .4 Provide the number of years the firm has been in business.
- .5 Describe any additional value added services that the Proponent can offer to the CRP.
- .6 Provide a detailed budget for the project identifying hourly rates of each member of the team and the estimated total budget.

6.2 Methodology

- .1 Identify the project methodology to be followed.
- .2 Identify anticipated schedule of milestones.
- .3 Identify the CRP resources required. Include any anticipated interview requirements and estimates of staff hours. Identify any training requirements.
- .4 Identify other CRP resources anticipated.
- .5 Identify the communication plan provided within your methodology.
- .6 Identify the anticipated length of time to complete the work.
- .7 Describe the capabilities in terms of methods, approach, and tools the proponent intends to deploy in fulfilling project scope and requirements.

6.3 Knowledge & Experience

- .1 Identify the on-site staffing resources and qualifications that will be provided. Identify any resources that are not direct employees of the Consultant.
- .2 Provide a project organization chart of the core project team including the roles and responsibilities of each team member.
- .3 Describe how the Proponent's staff will be organized and deployed. Identify the person who will assume responsibility for managing project deliverables and serve as the Proponent's main point of contact.
- .4 Attach details (summaries – two (2) pages or less) concerning project personnel citing relevant regional / metropolitan experience and accomplishments in projects of comparable complexity and scope to this project.
- .5 Provide the complete curriculum vitae (CV) for the Proponent's Project Manager.
- .6 Provide at least three (3) verifiable customer references of which at least one (1) is a municipal government where similar projects have been completed.
- .7 Identify and provide a brief description of relevant and comparable projects that have been undertaken in the last five years, providing information with respect to the Proponent's achievements.

6.4 Resources

- .1 Submit a complete chart of services provided and resources required for such services.
- .2 Identify if any additional resources not specified in the scope of work are required.
- .3 Identify resources for any other milestones that are deemed appropriate.

7. EVALUATION MATRIX

Proposals are required to be evaluated and short-listed or rejected based on the following selection criteria:

Selection Criteria	Description	Point Value	x	Rating	= Total
GENERAL		10	x		
VALUE FOR MONEY		10	x		
METHODOLOGY		30	x		
KNOWLEDGE & EXPERIENCE		50	x		
RESOURCES		20	x		
TOTAL SCORE:					

The following table provides a brief description and relative weight for each of the criteria:

Rating	Description
5	Exceeds Expectations – Proponent clearly understands the requirements, excellent probability of success
4	Somewhat Exceeds Expectations – Proponent has a better understanding of requirements, good probability of success
3	Meets Expectations – Proponent has good understanding of requirements, good probability of success
2	Somewhat Meets Expectations – Proponent has minor weakness and/or deficiencies, fair probability of success
1	Does not meet expectations – Proponent demonstrates minimum understanding of the requirements, low probability of success
0	Non compliant – response indicates complete misunderstanding of the requirements, no probability of success.

*Note: A score of ZERO (0) on ANY of the Rated Criteria items MAY result in the disqualification of a Submission.

- These are the **ONLY** factors which will be used to evaluate the submission.
- The highest scoring or any submission will not necessarily be accepted.
- CRP reserves the right to accept or reject any or all submissions, as may be determined in the best interest of the CRP

8. PROPOSAL EVALUATION

- 8.1** The selection committee will score in accordance with the matrix provided. It is the intention of the CRP to shortlist the highest evaluated Proponents.
- 8.2** The short-listed Proponents will be required to participate in a Presentation / Interview process with the selection committee. Generally, one hour is allowed for this process, with 20-30 minutes for the presentation, midway through 30 minutes of interview questions.
- 8.3** The selection committee will then revisit their scoring matrix after the Presentation / Interviews and proceed with an award recommendation to the highest evaluated Proponent.
- 8.4** The CRP may then negotiate a final contract with the highest evaluated Proponent.
- 8.5** In the event that one Proponent scores significantly higher than the other firms, the right is reserved by the selection committee to eliminate the Short Listing Process and proceed directly to negotiations with the highest rated firm.
- 8.6** The CRP reserves the right to award the assignment in whole or in part or to delete any portion of the work.
- 8.7** Throughout all stages of the evaluation process, the evaluation committee may, at its discretion; seek additional clarification on any aspect of the Proposal; and perform reference checks as required to verify or clarify the information provided and to obtain additional performance information.

9. CONTACT INFORMATION AND SUBMISSIONS OF PROPOSALS

To clarify interpretation of any item of the specifications or other documentation before the closing date, contact:

Bob Miller (403.971.5938)
GIS Team
Calgary Regional Partnership

Email : curlymiller@shaw.ca

Proposals are to be **submitted electronically only** to the Calgary Regional Partnership by **2010 September 15th 4:30 p.m. MDT** to the following e-mail address:

Jennifer Hambly at jennifer@calgaryregion.ca

Only e-mailed electronic submissions will be accepted. Submissions should be in pdf format.