<u>**REQUEST FOR PROPOSAL – RFP001537**</u>
<u>**FOR DATA AND ANALYTICS OPERATING MODEL**</u>

<u>**ADDENDUM #2**</u>

This Addendum to RFP-001537 for Data and analytics Operation Model is being issued to provide the following questions and answers:

Question 1	**With the current Data Platforms Evolution (DPE) initiative, is CMHC seeking Azure-based recommendations and/or best practices?**
	The target operating model should take into consideration, but not be limited to, CMHC's target architecture (yes, including Azure-based DPE) to clarify how capabilities and services should be deployed to leverage the best of the target architecture.
Question 2	**Will there be sufficient access to all current teams (e.g., Data Governance, Data Management, etc.) as part of information gathering during the engagement?**
	CMHC's expectation is for proponents to provide detailed requirements for resources availability (by role and by week) to ensure sufficient capacity to successfully deliver the expected outcome. Access to the appropriate CMHC team members will be planned based on these detailed requirements. We expect core CMHC resources to participate in this initiative and ensure continuity and operationalization. We will also need to interact with the other teams (business analytics, data ingestion, data acquisition) and technical IT teams (architecture, operations). The proponent to suggest workshops time allocation.
Question 3	**Will there be dedicated, either in part-time or full-time capacity, CMHC resourcing over the 6-month period? This includes aspects of Project Management or other supporting functions.**
	CMHC will provide a project manager for this initiative. CMHC also has a part-time change management and communication resource for this initiative. We will need to understand the need in order to increase allocation %.
Question 4	**Is there an existing budgeted amount to support the engagement over the approximate 6-month period?**
	The anticipated budget for the services provided under the resulting agreement is estimated to not exceed $500,000.00 inclusive of all taxes and fees.

Question 5	Is there currently a well-defined data strategy, strong data governance model and/or well-defined data quality standards across all teams?
	Yes, there is currently a well-defined data strategy - founded on well-documented strategic initiatives - a strong data governance model, policies, directives and standards currently being deployed in the organization.
Question 6	What interaction models are currently defined as part of the EDGO & AA team?
	EDGO Target Operating Model cover data governance and management services such as data governance, data quality, metadata management (including data catalog), data classification, master & reference data management, enterprise content management, data domain modeling and data literacy. The AA team currently covers self-service analytics (power BI) and robotic process automation operations. We aim to integrate advanced analytics in 2023.
Question 7	What maturity level (e.g., Absent, Initial, Repeatable, Defined, or Managed/Modernizing) would CMHC currently evaluate its use of data & analytics practices of advanced analytics capabilities, including Artificial Intelligence and Machine Learning?
	A previous maturity assessment has identified CMHC at the "reactive" (Aware, Reactive, Proactive, Managed, Effective) maturity stage. Since, CMHC has conducted different initiatives aiming to reach a Proactive maturity stage. The expectation is for the Data & Analytics Target Operating Model to actively contribute to this journey by clarifying how to effectively increase maturity in a tangible way.
Question 8	Are there any change management activities expected as part of the engagement?
	All change management deliverables that proponents consider appropriate and required to deliver the expected outcome should be included in the services offered. As mentioned CMHC can provide support on communications and change management execution up to 20%, based on requirements specified by the proponent.
Question 9	Could CMHC please share the rationale behind proposing a 6-month timeline for executing the project? Can the proponent propose a more compressed timeline for delivering the proposed deliverables?
	CMHC's expectation is for proponents to propose a realistic timeline based on their experience in executing such projects with similar organizations. Please take into consideration that CMHC's capacity is currently divided amongst different priority initiatives including this one.

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	The 6 months is a maximum expected duration and takes into account time for reviews, feedback and approval of requirements. Stakeholders are supporting multiple initiatives and as soon as we have a target timeline for workshops and documents review we will be able to confirm their participation. We need to consider year-end Holidays with an estimated pause of work from December 19 to January 9)
Question 10	**The deliverables specifically calls out an Advanced Analytics Roadmap. Does CMHC already have a Data Management roadmap, or is there an expectation that the advanced analytics roadmap include data management capabilities as well?**
	CMHC currently has a roadmap for the Corporate Data Program (CDP) and a detailed roadmap for EDGO's (data governance and management) scope of work within CDP. Advanced Analytics Roadmap is a deliverable to be produced as part of this mandate and it should support/anchor/complement existing ones. The main purpose for this AA roadmap is to be able to document business priorities for use case implementation of AA and confirm a pilot use case.
Question 11	**Could you please provide a list of capabilities that are considered as advanced analytics within CMHC? The proposal refers to capabilities such as Robotic Process Automation, Data Acquisition & Sharing etc., within the current state assessment section. Should these capabilities be considered as part of cost-benefit analysis and AA roadmap?**
	CMHC aligns its general definition of advanced analytics to the industry, meaning the more advanced stages of analytics, including predictive, prescriptive, machine-learning and artificial intelligence. RPA is generally associated to Advanced Analytics and Data Acquisition & Sharing is considered as an opportunity for CMHC to generate value (and potentially revenues) by sharing enriched/value-added data to external parties. All of the above can and should be considered in the cost-benefits scenarios
Question 12	**Would CMHC please consider providing a 2-week extension to the proposal delivery timelines?**
	CMHC has postponed the Submission Deadline to: 2:00 PM EDT on October 5, 2022
Question 13	**In section J, security clearance verification, should those details be provided as part of the proposal response, or as part of the contracting process?**
	Security clearance status for each team members helps CMHC understand proponent's readiness to deliver the proposed services and is therefore a requirement. Only the selected proponent is required to provide proof of the security clearance results as part of the pre-condition of awarding a contract.

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Question 14	Given vacation volumes and the surge of RFPs due around this same time, we respectfully request a three week extension to the due date of this RFP.
	Please see the response to Question #12.
Question 15	Section B.3. Resource Requirements states that the "resource proposed...must have at least 10 years experience". Recognizing the relative newness of some of the fields and technologies in scope, and optimized delivery models, would CMHC accept a blended team of Senior, Intermediate and Junior resources where the senior resources have the highest years experience and the junior have less?
	The nature of the proposed mandate requires a very high-level of seniority (hence the requirement documented in the RFP). Junior or intermediate resources can be leveraged at the proponent's discretion but the proponent selection will be done based on the CONFIRMED senior resources proposed. CMHC maintains its requirement for 10 years of experience for the key confirmed senior resources on the mandate. Additional resources can be added to the engagement at the discretion of the proponent but will not directly influence CMHC's decision on the proponent selection.
Question 16	Are there incumbents or third parties that CMHC has worked with to produce related deliverables or work that has led up to this scope? This includes the documents listed to be included in the Current State analysis.
	Yes, CMHC has previously collaborated with external parties to achieve some deliverables listed as sources of information. These sources of information are owned by CMHC's team members.
Question 17	Section B1 Deliverables for current state analysis mentions "Data Ingestion and Preparation". Can you provide a further description of what you mean by these activities?
	We generally refer to the engineering of data, from source to target, in order to create value with it. Ingestion is normally refers to the stage between the data sources and system of records and the data lake or data warehouse while preparation refers to the transformation of data to create business metrics and performance indicators to make decisions.
Question 18	Section R.3.1 specifies that proponents are required to commit named resources that will, upon award, be assigned to the project. Given that the project start date is indeterminate and it is important that we maintain high utilization of our resources, would CMHC permit proponents the option of substituting the resources assigned to the project, provided they have equivalent or greater qualifications (credentials & experience) than the resources included in our proposal response?

	CMHC understand resources availability constraints and can accept limited changes in resources assignment BEFORE the start of the mandate. However, please note that the CONFIRMED team members will largely influence CMHC's decision for this type of engagement so please clarify which team members are potential vs. confirmed.
Question 19	**Is the final product for this procurement intended to be a report detailing a model that covers the deliverables (listed under B.1., page 23) rather than a piece of software that implements a hub and spoke model?**
	"Hub and spoke" here do not refer to a technological architecture but to an organizational approach - sometimes called federated or hybrid. As per section B1, CMHC expect proponents to deliver a target operating model detailed how to operate the people, services, processes, etc. to manage and create value with data throughout the organization. The other deliverable - Reference Architecture - answers the need for the underlying architecture - design patterns and tools at the capacity level - to support the target operating model.
Question 20	**Given the nascency of modern advanced data analytics tools, the requirement for 10 years of experience is a high barrier to entry. For example, some of the services and software mentioned in the RFP are less than 10 years old (Databricks) or only just over 10 years old (Azure). Would you accept proponents with five years of experience?**
	Predictive Modeling has been a discipline for over 25 years. Some technologies and practices are new but not the overall discipline. Please also see the response to Question #15.
Question 21	**Are proponents required to confirm security clearance for personnel in advance of submitting an RFP response? Or is this only required at the pre-award stage?**
	Only the selected proponent is required to provide proof of the security clearance results as part of the pre-condition of awarding a contract.
Question 22	**Would it be possible to get the French version of the RFP ?**
	Yes, when available the French version of the RFP will be accessible via buyandsell.gc.ca. It is anticipated to be available to proponents no later than Monday September 19. Please note that all proposed resources must be fluent in English.
Question 23	**Are there any proponents of this RFP who are currently engaged in working with CMHC for Data & Analytics and AI/ML Models?**
	CMHC hires different consulting firms for different initiatives, including on Data & Analytics

Question 24	Typical engagements have a combination of experienced leaders that will meet the 10 yr requirements together with a supporting team that may have less experience. Can you please consider revising the requirement that 50% (or any other split) of the team must have 10yrs experience?
	Please see the response to Question #15 and #20.
Question 25	What CMHC resources and allocations will be involved in the delivery of this program?
	Please see the response to Question #2.
Question 26	CMHC has outlined a 6 month delivery timeline, are there any key milestones that we should take into account or can we propose alternative timelines?
	Please see the response to Question #9.

All other terms and conditions remain unchanged.