

For Information Only



Edmonton Global  
Suite 100, 10020 100 St  
Edmonton, Alberta  
T5J 0N5

REQUEST FOR PROPOSAL (RFP) #2021-MC-02

“Website Redevelopment”

FINAL: November 16, 2021

Closing Time:

Wednesday, December 1, 2021 at 14:00:00 Hours.

## SECTION 1 – INSTRUCTION TO PROPONENTS

### 1.1 INVITATION TO SUBMIT PROPOSAL

Your firm is hereby invited to submit a proposal (the “Proposal”) in response to the Request for Proposal (“RFP”) for Edmonton Global for the provision of “Website Redevelopment” as set out in this RFP documentation.

Request for Proposal:	RFP #2021-MC-02
Description:	Edmonton Global – Website Redevelopment
Date Issued:	November 16, 2021
Closing Date:	December 1, 2021
Closing Time:	14:00:00 hours MDT

Indicate RFP Number and description on all correspondence.

This RFP does not commit Edmonton Global to award a contract or pay any costs incurred in the preparation of a Proposal, or meeting with Edmonton Global staff, or otherwise.

Proponents shall carefully read the RFP documentation and submit proposals subject to all conditions contained in the RFP documents. Proponents shall make all investigations necessary for estimating as to the conditions under which the work must be carried out and its nature and location. By submitting a Proposal, the proponent agrees to abide by and carry out all conditions set forth in the RFP documents.

### 1.2 INQUIRIES AND ADDENDA

Refer all written Proposal inquiries to Jane Mayaki, Digital Marketing Manager, by e-mail at: [info@edmontonglobal.ca](mailto:info@edmontonglobal.ca). All written inquiries and the replies thereto will be provided in “question and answer” format posted to the MERX website as an addendum. It will be the proponent’s responsibility to check the website for any additional information.

Should the proponent find, during examination of the RFP documents, any discrepancies, omissions, ambiguities, or conflicts on or between the RFP documents or be in doubt as to their meaning, the proponent shall bring the question to the attention of the person noted above, not less than three days before the Closing Date. Should the proponent fail to bring the discrepancy, omission, ambiguity or conflict to the attention of Edmonton Global within the aforesaid time, the proponent shall accept the decision of Edmonton Global as to the resolution of such discrepancy, omission, ambiguity or conflict and it will be deemed that the proponent has included the most costly alternative in its Proposal.

Edmonton Global reserves the right to amend or revise the RFP documents by addenda up to 48 hours prior to the Closing Time. Verbal instructions given in person are null and void and shall not be accepted by the proponent. All addenda will be posted to the MERX website. It will be the proponent’s responsibility to check MERX for any additional information. It is the proponent’s responsibility to ascertain and verify, prior to the Closing Time that it has received any and all addenda issued in relation to this RFP.

### 1.3 PROPOSAL SUBMISSIONS

Proposals shall be received via email only. Submission must be marked with the RFP number as well as the supplier's name.

Attention: Jane Mayaki, Digital Marketing Manager  
Email: info@edmontonglobal.ca

Proposals must be time marked as received prior to the Closing Time on the Closing Date or they will not be accepted for this particular RFP.

Faxed Proposals will not be accepted nor considered. Any Proposals that are received via facsimile will be returned by mail to the proponent.

Edmonton Global is not responsible for the timelines of documents received nor will Edmonton Global accept any Proposals received to a location other than the above-specified address.

Each proponent may submit more than one (1) option for proposal submission provided that all options are clearly identified and follow the requirements of this RFP.

### 1.4 PROPOSAL COPIES

The proponent shall provide a complete electronic copy of its Proposal in .pdf format to Edmonton Global.

### 1.5 Proposal Format

Proposals should adhere to the following format:

#### 1.5.1 Letter of Transmittal

A Letter of Transmittal or covering letter, dated and signed by an official authorized to negotiate, make commitments, and provide any clarifications with respect to the Proposal on behalf of the proponent.

#### 1.5.2 Executive Summary

An Executive Summary, touching on pertinent points in the Proposal you wish to highlight, including an overview of the project schedule and costs.

#### 1.5.3 Corporate Profile

A brief corporate profile, which covers the company's history, office location, and relevant corporate history.

#### 1.5.4 Response to Requirements

Proponents are required to detail their organization's ability to satisfy, at minimum, all aspects of the requirements as outlined in Section 2. Proponents are also required to review, in detail, Section 3 - General Terms and Conditions.

#### 1.5.5 Project Team

Proponents are to clearly identify each member on the project team and fully describe the involvement that they have on the team. Each team member will have included a resume complete with related experience in similar projects.

#### 1.5.6 Related Experience and Expertise

The proponent will provide a comprehensive list of related experience and expertise in the preparation of “Edmonton Global – Website Redevelopment” starting with the most recent.

#### 1.5.7 References

The proponent shall include applicable references with their proposal package. Each of the references shall include the complete corporate name, contact person complete with title, and phone number including area code.

#### 1.5.8 Certification

All proponents responding to this Request for Proposal are required to sign the certification under Section 5. Failure to complete, sign and submit the certification may disqualify the Proposal.

#### 1.5.9 Pricing

The pricing for this project is to be provided as outlined in Section 4.

### 1.6 EVALUATION

The first stage of the evaluation process will consist of a review of all Proposals to ensure that each Proposal was received on time and the certification is properly completed and signed, and the Proposal is sufficiently responsive to the RFP.

The second stage will consist of an evaluation of the written Proposal based on the criteria outlined below.

#### Second Stage (Written Proposal) – Evaluation Criteria

*In evaluating the Proposals, Edmonton Global reserves the right to consider any matter that it considers appropriate, in its sole and unfettered discretion, including but not limited to:*

- (a) Introduction to proposal and understanding of project relative to the Edmonton Global’s requirements;*
- (b) Skills and experience to carry out the project to Edmonton Global’s satisfaction, including examples of similar projects.*
- (c) Proposed methodologies, including approaches used to carry out the project.*
- (d) Time frame for completion of project, from the first organizational/discovery meeting with to the adoption (expressed in hours and days, based on an 8 hour day).*
- (e) An assessment of the professional Consulting team to be assigned to the project with consideration given to the time each person will devote to the project expressed in hours based on an 8 hour day.*
- (f) Overall quality of proposal.*
- (g) Upset cost of services and final product.*

(h) *Satisfaction of other clients with Consultant's work.*

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Edmonton Global reserves the right to conduct discussions with any proponent that to assure full understanding of its Proposal.

Upon completion of stage two, one or more proponents may be invited to participate in the third stage.

The third stage of the evaluation may consist of an interview. If Edmonton Global decides to have a third stage, proponents invited to participate must ensure that the individual identified as the project leader in their Proposal is in attendance during the interview portion of the evaluation in addition to any other key personnel that the proponent wishes to include.

Edmonton Global may alter or eliminate stages of the evaluation process as it deems appropriate.

Without limiting the foregoing, Edmonton Global may in its sole discretion choose not to proceed to the third stage of the evaluation and in such instance may select a proponent based on the second stage evaluation criteria without consideration for the third stage evaluation criteria. *In evaluating the Proposal at the third stage, Edmonton Global reserves the right to consider any matter that it considers appropriate, in its sole and unfettered discretion, with or without consideration to the Second Stage Criteria.*

If appropriate to do so, Edmonton Global may decide to identify the proponent that Edmonton Global deems to be most preferred (the "Most Preferred Proponent"). Edmonton Global may also decide to identify the proponent that is next most preferred and likewise. If Edmonton Global identifies a Most Preferred Proponent, Edmonton Global and the Most Preferred Proponent shall enter into negotiations with a view to agreeing upon the terms of an acceptable contract. If, in its sole discretion, Edmonton Global determines that it and the Most Preferred Proponent will be unable to agree upon the terms of a contract, Edmonton Global may terminate negotiations with the Most Preferred Proponent and enter into negotiations with the next most preferred proponent. Edmonton Global may terminate negotiations and enter into negotiations with the next most preferred proponent as many times as it deems necessary.

Edmonton Global reserves the right to identify a Most Preferred Proponent or to reject all Proposals and to waive irregularities, informalities and non-compliance with this RFP at its sole and unfettered discretion. Irrespective of its decision, in no circumstance will Edmonton Global be required to provide reasons for its decision.

By submitting a Proposal, each proponent agrees that any claim that the proponent may have against Edmonton Global (and Edmonton Global's employees, agents, Board and elected officials) for damages, losses, or expenses or for any other legal relief, arising, directly or indirectly, in relation to this RFP process (whether in contract, tort, or other legal theory) is limited to an amount equal to the proponent's actual and reasonable costs in preparing its Proposal. For clarity, each proponent specifically waives as against Edmonton Global (and Edmonton Global's employees, agents, Board and elected officials) any claim for consequential or indirect damages, loss of profit, loss of opportunity, judicial review or injunctive relief.

## 1.7 PRIVACY AND CONFIDENTIALITY

All documents submitted to Edmonton Global are subject to the protection and disclosure provisions of the Freedom of Information and Protection of Privacy Act ("FOIPP"). While FOIPP allows persons a right of access to records in Edmonton Global's custody or control it also prohibits Edmonton Global from disclosing your personal or business information where disclosure would be harmful to your business interests or would be an unreasonable invasion of your personal privacy as defined in sections 16 and 17 of FOIPP. Proponents are encouraged to identify what portions of their Proposal are confidential and what harm could reasonably be expected from its disclosure.

The purpose of collecting personal information required to be provided in this RFP is to enable Edmonton Global to ensure the accuracy and reliability of the proposal, and to evaluate the submission in response to the RFP. This information is required by Edmonton Global to carry out its operations.

It is recommended that proponents advise persons whose personal information is being provided to Edmonton Global under this RFP that FOIPP will govern the privacy of the personal information as well as its possible disclosure by Edmonton Global to third parties, upon request.

Questions about the collection of personal information pursuant to this RFP shall be submitted to Edmonton Global's Office Manager.

In the event that Edmonton Global chooses to have a public opening, Edmonton Global will only disclose the proponent's name and the total bid price, with or without GST as requested in this RFP.

After Proposals have been opened, Edmonton Global may, at its discretion, release to the public a summary of proponents and the price submitted by each proponent.

## 1.8 COLLUSION AND CONFLICTS OF INTEREST

Except as specified within its Proposal, each proponent declares that no other person, either natural or corporate, has or will have any interest or share, directly or indirectly, in its Proposal or in the contract which may be awarded. There is no collusion or agreement, formal or informal, between proponent and any other actual or prospective proponent in connection with the Proposal submitted for this RFP. Each proponent represents and warrants that it has no knowledge of the contents of any other proposal; and the proponent has made no comparison of figures, agreement or arrangement, expressed or implied, with any other party in connection with the making of its Proposal, except as declared within the Proposal.

Proponents shall disclose, in their Proposal, all perceived, potential and actual Conflicts of Interest. If a proponent prior to or following submission of its Proposal, discovers any perceived, potential or actual Conflicts of Interest, the proponent shall promptly disclose the perceived, potential or actual Conflict of Interest to Edmonton Global in a written statement.

At the request of Edmonton Global, the proponent shall provide Edmonton Global with the proponent's proposed means to mitigate and minimize to the greatest extent practicable any perceived, potential or actual Conflict of Interest. The proponent shall submit any additional information to Edmonton Global that Edmonton Global consider necessary to properly assess the perceived, potential or actual Conflict of Interest.

Edmonton Global may, in its sole discretion, waive any and all perceived, potential or actual Conflicts of Interest of proponents. A waiver may be upon such terms and conditions as Edmonton Global, in its sole discretion, require to satisfy itself that the Conflict of Interest has been appropriately managed, mitigated and minimized, including requiring the proponent to put into place such policies, procedures, measures and other safeguards as may be required by and be acceptable to Edmonton Global, in its sole discretion, to manage, mitigate and minimize the impact of such Conflict of Interest.

For the purposes of this RFP "Conflict of Interest" includes any situation or circumstance where, in relation to the work described in this RFP, the proponent's other commitments, relationships or financial interests:

- (a) could or could be seen to exercise an improper influence over the objective, unbiased and impartial exercise of independent judgment by any personnel of Edmonton Global or its advisors; or
- (b) could or could be seen to compromise, impair or be incompatible with the effective performance of a proponent's obligations under the contract with Edmonton Global Agreement if that proponent was determined to be the Most Preferred Proponent under the RFP.

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## SECTION 2 – PROPOSAL DOCUMENTS

### PROJECT NAME: Edmonton Global – Website Redevelopment

#### 2.1 PROJECT PURPOSE

1. Edmonton Global (EG) is looking to redevelop its website to better function for key audiences, become more focused on lead generation and engagement, and best reflect the brand of the Edmonton Metropolitan Region. Edmonton Global is accepting proposals from highly qualified, experienced website development companies to design, develop and implement its public facing website. The chosen strategic partner (Vendor) must be a firm with experience in websites that are aligned within a Salesforce/Pardot environment that emphasize digital campaigns, engagement, customer journeys, and lead conversion. An understanding of or experience in building sites for economic development organizations would be an asset, with expertise in the following:

- Successful website redesign
- User experience (UX/UI) and usability testing
- Information architecture
- Website development and deployment
- Website hosting
- Content strategy
- Social media integration
- Search engine optimization
- Responsive design
- Built-in a/b testing
- Salesforce & Pardot integration
- Multi-language audiences

Although Edmonton Global has specific requirements, we are also interested in your ideas for the approach of redesigning the style of our website. We encourage respondents to consider and propose alternative solutions and recommendations. We are particularly interested in specific web functionality that your company may have already developed and deployed for other customers.

#### 2.2 ABOUT EDMONTON GLOBAL

1. The purpose of Edmonton Global is to radically transform and grow the economy of the Edmonton Metropolitan Region. Our work promotes the region globally and we're focused on attracting and retaining business investment and trade right here. We are the first ever regional economic development corporation in the region, working to create local, regional, provincial, national, and global partnerships. We collaborate with all levels of government and economic development agencies including our 14 municipalities, Invest Alberta, Alberta's Industrial Heartland Association, the Edmonton International Airport, Edmonton Health City, the Alberta Machine Intelligence Institute, and Invest in Canada.

### Collaborating Locally to Compete Globally

Our economy and society have seen unprecedented change and upheaval as major global forces usher in a new era of disruption. But in disruption, there is also opportunity. Changes in the global economy present unique opportunities for the Edmonton Metropolitan Region in food production, health innovation, advanced manufacturing, energy, and Industry 4.0. By combining our strengths, leveraging partnerships and increasing our global competitiveness, we will usher in a new era of economic prosperity for our region and for generations to come. It is in this context, that the 14 municipalities in the Edmonton Metropolitan Region united around a shared belief: that our success is interconnected. The municipalities knew that they would not see success independent of each other, that they had to work together to attract investment. They believed by combining the best assets from each of their communities, that would be a compelling value proposition, and by telling that story together, in unison, it would be loud enough for the world to hear. As a result of this ambition, Edmonton Global was created.

## 2.3 PURPOSE OF OUR NEW WEBSITE

1. Our new site should:
  - 1.1 Play a key role in awareness building, lead generation and conversion of international investors.
  - 1.2 Provide meaningful data that can help identify investors and opportunities.
  - 1.3 Serve the needs of all users by letting them easily find what they are seeking, providing them with access to key content pieces 24/7.
  - 1.4 Promote transparency of the work EG is currently doing for the region by making it easy for us to share and post information and for our users to find and interact with information.
  - 1.5 Be strategic, focus on making our helpful content interactive, and engaging. We know that things will change in the future, and we want our site to adapt and remain relevant.
  - 1.6 Represent the Edmonton Global brand for those already in our community (governments and elected officials, residents, visitors and businesses).
  - 1.7 Represent the Edmonton Metropolitan Region's brand for investors and others investigating communities to make investments or expand their business operations to be an informative tool for media (local, national, and international) to engage with to find data on our region.
  - 1.8 Have a password accessible portal that allows us to share content privately with our partners and shareholders.
  - 1.9 Meet and exceed Google's minimum requirements for Core Web Vitals.
  - 1.10 Increase user behavior, page load times, time on site and reduce bounce rate.

## 2.3 PROJECT TIMELINE

- RFP submission deadline – December 1, 2021
- Evaluation – completed by December 10, 2021
- Commencement, internal meeting – December 14, 2021
- Discovery Session, Regional Stakeholders – December 16, 2021
- Soft Launch – March 15, 2022
- Launch – March 22, 2022

## 2.4 PROJECT OBJECTIVES AND GOALS

### 1. The primary objectives and goals for this website design are

- 1.11 **Interactive and Engaging Website** - We are seeking to redesign our website to include an intuitive, responsive, and easy-to-use interface that allows visitors and business partners to complete their "tasks" quickly and efficiently regardless of the device they are using. The solution should be a user-friendly CMS that is simple to use and easy to maintain for our administrators and content creators. This solution will streamline business operations and increase productivity with a built-in analytics setup for primary website goals. The website should allow easy integration with all our current platforms/ software we utilize for business operations.
- 1.12 **Research-Based Design** - We want a site that meets the unique needs of our business. We are not looking for a cookie-cutter or templated solution. Our Vendor should employ a strategic research-based and data-driven process to gather input, define expectations and design a consistent, user-friendly UX/UI framework for the website that meets the needs of all users and our business
- 1.13 **Responsive Site** - Visitors will utilize various devices to access our website, including computers, tablets, and mobile smartphones. The new website should automatically detect the screen resolution of any device and respond with a view of the site that is optimized specifically for that screen. This will ensure that all users can view our site, no matter what device they are using.
- 1.14 **Flexible Solution** - The new site should be built on proven and acceptable standards while maintaining the flexibility to easily grow and add new functionality over time and with minimal cost. The solution also must have the ability to accommodate existing auxiliary sites while still maintaining a unique feel and look our brand. We will prefer if the new site is built on leading CMS like Wordpress, Joomla etc. We do however will point out that with plugins, less is better for us.
- 1.15 **Built-in Analytic Features** - The new site should have heat maps to help us understand user navigations and the ability to carry out A/B testing on pages to allow ongoing page optimization.
- 1.16 **Simplifies and Streamlines Administration** - The new site should allow users of varying skill levels to update assigned sections of the website. The new site should allow seamless creation of custom pages by administrators and reduce the time IT spends on enhancing and maintaining the site.

## 2.5 CURRENT WEBSITE

- 1.1 The current website was last launched in 2019 and is showing its age. The website exists on WordPress, and the plugins that were once very helpful are starting to erode. Common issues include indexed pages returning a 404 error, poor CWVs, poor page load times, constant crash with plugin update, poor user navigations etc.
- 1.2 The website consists of web pages, photos, and documents currently hosted on WordPress CMS.
- 1.3 The website is not modern, not consistently responsive, not very simple to navigate or customize.
- 1.4 Edmonton Global is an organization whose mandate is to radically transform and grow the economy of the Edmonton region, and our site doesn't reflect that purpose.
- 1.5 The website was developed with Wordpress YooTheme, some Elementor pages and hosted on AWS through our current partner Conway.

## 2.6 PROJECT SCOPE

1. Preference will be given to vendors with experience developing websites for within a Salesforce/Pardot environment with special attention given to vendors' breadth of experience, references, number of years of experience and expertise of the staff. The Vendor will have a remarkable experience with UX/UI framework development based on research and implementation.

Additional development criteria include:

- 1.1 **Collaborative Effort** - The website will be developed through the cooperation of Edmonton Global, our marketing agency, and the Vendor.
- 1.2 **Proven Content Management System** - The proposed content management software must be a proven platform for website development and website architecture. This platform should allow for easy collaboration between the developer and Edmonton Global.
- 1.3 **Internal Development Staff** – Due to the confidentiality of our work, Edmonton Global prefers a vendor utilizing its development staff rather than subcontracting pieces of the project development to additional vendors.
- 1.4 **Internal Design Staff** – we will want you to have design staff(s) with experience designing websites that are vibrant and intuitive with a clean and easy-to-use interface. The design team should have the ability to design vibrant images, enable widget animations and build custom templates for future uses
- 1.5 **Integrations** – Edmonton Global uses Salesforce/Pardot. We want to maintain this data backbone in our new site and enhance our marketing, lead generation, engagement, and overall investor journey metrics. Integration would involve a data feedback loop from the website to Pardot/Salesforce and vice versa. Data would include page visited, lead conversion, unique and repeat visitors, visitor information if already provided, etc. A team who has worked with these tools is strongly desired.

## 2.7 DESIGN GUIDELINES AND QUALIFICATIONS

1. The website's design should be welcoming, attractive, responsive, intuitive, and reflective of the Edmonton Global Brand. The final version of the design would be a collaborative effort between Edmonton Global and the Vendor, incorporating elements that effectively represent our brand and image through a data-driven and consultative development process. We would want the Vendor to utilize a data-driven design process to gather information to complete a comprehensive redesign of our website. The techniques should include the best practices of usability and user experience. Following the guidelines set for web accessibility (WCAG) by the Web Accessibility Initiative, Accessibility for Ontarians with Disabilities Act (AODA) and the World Wide Web Consortium, our website must be perceivable (visitors are aware of the content on our site), operable (the functionality of our website should be possible in different ways), understandable (all content and alerts can be easily understood) and robust (our website is usable across different assistive technologies, devices, and browsers).

Many of our targeted visitors are outside of Canada and North America. Our site must be compliant with international standards, including tracking, and have a strategy on how we it will display in different languages (Google translate, alternate language pages, etc.)

Specific design guidelines include:

- 1.1 **A Discovery/Audit Process** would be an ideal starting point to ensure the site is fully mapped out and the project's scope is fully locked in.
  - 1.1.1 A major outcome would be an audit/inventory of existing content, URL mapping, backlinks, 301 redirects etc.
  - 1.1.2 The Vendor would analyze the accessibility of the current site and make recommendations for the new site.
  - 1.1.3 The Vendor would utilize historical site analytics to understand patterns and valuable information to the new site.
  - 1.1.4 The Vendor would conduct user research (User Usability testing) to test interaction and mobile usability testing to analyze current sites for mobile statistics and functionalities. The result from usability testing would help in building the new site's wireframe, interior design pages and navigation systems.
- 1.2 **Heat Mapping** - the Vendor should use heat mapping to collect information about standard common actions taken on the current site to review functionality and behaviour. The heat mapping should include where people have clicked, scrolled, and hovered on the page. This data would be used to troubleshoot and identify opportunities.
- 1.3 **Consistent Website Design** - Website design must remain consistent throughout all pages to maximize usability, except where differentiating between departments or sections of the website.
- 1.4 **Design Overview** - Website design must be visually appealing, incorporating our brand colours and logo where appropriate.
- 1.5 **Easy Updating** - Design elements should include background images, photographs, logos and buttons that are easily updated or swapped out by our staff at any time and without incurring any additional implementation or update charges
- 1.6 **Visual Hierarchy and Navigation** - web design must follow a clear visual hierarchy, allowing the precise organization of web elements to easy user flow and navigation when on the website. While design should be simple, it should enable frictionless navigations between pages.

## 2.8 RESPONSIVE WEBSITE

1. We recognize that there are two ways to build a responsive website: responsive design and adaptive design. Responsive design provides one layout that fluidly changes depending on the size of the screen. Adaptive design has several distinct layouts for multiple screen sizes built for the device's specific needs. We seek a vendor partner with experience in both approaches and can combine both in a simple user experience. The responsive design includes but is not limited to:
  - 1.1 Creation of responsive templates
  - 1.2 Navigation redesign
  - 1.3 Creation of fluid grids
  - 1.4 Simple site maps
  - 1.5 Image adjustments
  - 1.6 Content block adjustment
  - 1.7 Ability to adjust or modify responsive pages/templates

## 2.9 SYSTEM FUNCTIONALITY

1. The Vendor's proposed content management system (CMS) should be a web-based application that provides the core of the entire development process, being both the platform for development and the tool by which system administrators and contributors can update the

new website. The CMS may feature plugin applications or modules that enhance the website's functionality. However, core features should center around ease-of-use, flexibility, and established information architecture and hosting environment for ongoing stability. The CMS must allow non-technical content contributors the following abilities:

- 1.1 **Administrative Dashboard** – this portion of the CMS should be accessible for all content contributors. It should feature a customizable interface that displays critical shortcuts, on-site items that require attention, recent activity logs and an internal messaging system that displays administrative messages and updated information.
- 1.2 **Automatic Sitemap** - The CMS should automatically create and update XML sitemap when content is added, edited or removed from the site.
- 1.3 **Content Management** - A way to add, edit and move content directly on an assigned webpage without the need to utilize or be trained on a back-end administrative system (i.e. HTML). Admins should be able to create links, hyperlinks, redirects and/or shorten links. The Dashboard should also allow for content expiration notification, show when specific content was last updated, and allow for notifications when certain periods are reached.
- 1.4 **Content Preview** – content publishers must have the ability to preview changes before publishing on the site.
- 1.5 **Content Scheduling** – Content added to the site, whether as part of page content or additions to plugin applications or modular elements, shall feature delayed posting and automatic expiration abilities.
- 1.6 **Menu Updates** – Administrators shall have the ability to add, edit, update, and move menu items, affecting overall site structure and organization.
- 1.7 **Page Templates** - Administrators must have the option to use pre-created page templates (and/ or create custom pages using design content blocks/widgets) to assist in the formatting and development of new content or update old ones. Content publishers should have the flexibility to place content blocks anywhere within a page that fits the specific need of that page. The widget must have the setting to customize its look and function to meet a particular need. The content publisher must have the ability to share the template and/or use a template from a wider community pool that shares consistent page development.
- 1.8 **WYSIWYG Editor** - the CMS must have an advanced WYSIWYG rich text editor for content additions that is flexible, straightforward, and easy to use.
- 1.9 **CMS Activity Reporting** - A report detailing all changes and activity taking place on the website through content contributors and administrators, which can be filtered by start and end dates, times, by content type and by action taken, and exportable.
- 1.10 **Content Categories** - Administrators shall have the ability to create content categories within CMS applications and modules and edit the parameters for categories.
- 1.11 **Emergency Live Support** - Designated administrators, shall have access to live support for content emergencies. Please specify the timeframes for emergency support.
- 1.12 **Graphics Administration** - Administration of on-site banners and graphics, with the ability to add new banners and on-site graphical elements and assign those elements to specified areas of the site.
- 1.13 **Login History** - A separate history report detailing user login history, including the user type, the date and time of the attempted login, the user's IP address, and whether or not the login attempt was successful.
- 1.14 **Site Search Statistics** - Access to site search statistics, including the ability to filter search terms by date and time, which can also be exported.
- 1.15 **User-friendly URLs** - The system should create user-friendly URLs, redirect URLs, shortened URLs, and hyperlinks.
- 1.16 **Support Workflow** – Ability to create role-based tasks and assignments and manage several editorial and non-editorial workflow.

## 2.10 SYSTEM ADMINISTRATION

- 1.1 **Broken Link Review** - An administrative center for reviewing quality assurance, including detailing broken links on the website and the referring page location to correct links.
- 1.2 **Dynamic Menu Structure** - A dynamic menu structure with the ability to easily add, edit, move, and delete menu items in multiple structural areas of the site.
- 1.3 **Infinite Menu Levels** - An infinite menu level system that allows the addition of an unlimited number of menu levels by Edmonton Global.
- 1.4 **Infinite Page Structure** - An infinite page structure system that allows the addition of an unlimited number of pages by Edmonton Global.
- 1.5 **SSL Certificate** - If necessary, one or more SSL certificates to encrypt data contained in site transmissions.
- 1.6 **Website Analytics** - An administrative center for reviewing, filtering, and exporting overall website statistics, including viewing statistics by page or section and presenting the information in a graphical representation.

## 2.11 SYSTEM FEATURES

- 1.1 **Accessibility Add-ons** - Accessibility software embedded in the website that offers users access to larger fonts and audible content.
- 1.2 **Advanced Site Search** - Provide an internal site search that:
  - 1.2.1 Users should be able to sort search results by date, content, title or relevance; users should be able to filter by type of content and easily apply advanced search techniques if desired. Search functionality should search web content and the contents of files (PDFs, Word Documents etc.)
  - 1.2.2 Administrators should be able to tune the search results by using Admin synonyms for common words or terms and promote pages through keywords.
  - 1.2.3 The search function is contained exclusively within the site and not outsourced to an external page hosted by a search provider such as Google.
- 1.3  **Blogging** - Solution would allow the creation of multiple blogs to be used by different individuals or departments within our organization. Blogging functionality should include the ability to tag or categorize posts, including a calendar and commenting functions. Blogging categories functionality can be pulled across any page on site to reflect relevant categories to the page it lives on.
- 1.4 **Document Archive and storage** - A document archive for specified categories of documents with built-in filtering abilities and search capabilities. An on-site document storage application with unlimited levels of folders, providing centralized storage of any type of file.
- 1.5 **Notifications** - Want a tool that provides a sign-up box allowing users to add their email addresses to receive important notices. Users should be able to set their preferences and should have their sign-up validated via a confirmation email. This functionality should be integrated with Pardot, job postings, news, and RFP postings.
- 1.6 **Embedded Audio/Video/Media and Social Media** - Easy embedding of audio, video, media and social networking applications with associated embed codes.
- 1.7 **Event Calendar** - An event calendar application that allows an unlimited number of calendar categories or types to be added to the site, with an unlimited number of items allowed to be added within each category.

The following features should also be available:

  - 1.7.1 Capability to set up calendar events as single or recurring events, with daily, weekly, monthly or annual recurrences options.
  - 1.7.2 Calendar events shall provide space for complete descriptions, including posting images, tables, and videos within the description.

- 1.7.3 The site visitor can view calendars by a list of events, a week view or a month view.
- 1.7.4 Calendars shall be filterable by category, start date and end date, with the ability to search for keywords.
- 1.7.5 Site visitors can subscribe to updates from individual calendar categories through email (HTML or plain-text) or SMS text messages.
- 1.7.6 Event Registration - Visitors can easily register for events webinars and/or make appointments on the website. Registration for appointments must be secure, so that registrant information is not publicly available.
- 1.7.7 Ability to pay online for events that have a cost associated with them.
- 1.8 **Extranet** - The solution should have the capability to deliver an extranet or password-protected area of the website available only to those users approved to access certain content. We would like to have a “portal” that specific people can have unique sign in into and access confidential information related to them. This would include our shareholders, board of directors and other stakeholders. The information shared will be unique to each viewer.
- 1.9 **FAQ Tool** - Solution should have a FAQ application that allows an unlimited number of FAQ categories or types to be added to the site, with an unlimited number of items allowed to be added within each category.
- 1.10 **Form Creator** - Solution should have an online form development tool for Edmonton Global to develop interactive forms that would be integrated with Pardot and Salesforce.
  - 1.10.1 Ability to have unlimited categories of forms, with an unlimited number of forms in each category.
  - 1.10.2 The ability for visitors to complete and submit forms electronically.
  - 1.10.3 The method of storing form data in a database can be exported in a usable format from the CMS.
  - 1.10.4 Capability to merge forms with other applications of the CMS and provide a dynamic experience
  - 1.10.5 Ability to customize forms for other applications of the CMS and tie directly into those tools
  - 1.10.6 Ability to customize forms to access and process payment
- 1.11 **GIS Mapping** – Ability to embed with Edmonton Global GIS application of choice
- 1.12 **HTML Code** - The solution should have the capability to view the HTML code of any individual page and directly add or alter the code as necessary.
- 1.13 **Embed Functionality** - The solution should have the ability to enable document/ data/ content embeds with any HTML page seamlessly either through iframes or JavaScript.
- 1.14 **Image Management** - Image management tools for adding and compress images to on-site content through web pages and modular elements associated with the CMS.
  - 1.10.7 Image editing abilities on uploaded images, including the ability to change opacity, resize images dynamically based on width and height, ability to constrain proportions, flip images, rotate images, crop images, restore images and save altered images as a thumbnail or alteration of the original upload or to replace the original upload with the modified image
  - 1.10.8 Capacity to upload multiple images simultaneously and associate images with specific pages; the maximum file size should be no less than two (2) megabytes.
  - 1.10.9 Ability to preview images before association with on-site content.
  - 1.10.10 Ability to alter image properties, including image width, image height, capability to associate or disassociate width and height, border colour, border width, image alignment, margins and application of CSS classes from overall website styles.
  - 1.10.11 Full accessibility options are provided in an easy-to-use interface that promotes all image-based aspects, including specification of alternate text and long descriptions.

- 1.15 **Intranet** - As an option, the solution should have a "true" intranet that can be implemented and hosted on our servers behind our firewall to increase our internal data privacy and security. The intranet solution should leverage the same content management system and allow us to share content easily with our public website without duplicating data. The Intranet should contain the following: document storage, news, calendar, forms, staff directory and workflow.
- 1.16 **Jobs Posts and Applications** - The solution should have a component to simplify the job posting process to reduce overall HR administrative time. Users should be able to filter available positions by category, type of position, posting date and salary. Administrators should be able to define categories and classifications of a job posting. The solution should have a module that helps hiring managers save time streamlining and simplifying the creation, customization, and management of online job applications. Functionality should include the ability to create application questions, mark questions as sensitive and encrypt answers, send customized notifications to applicants, personalized login for accounts for job seekers to view the status of their application, filtering capabilities to create and view applications list with dates, status, and other parameters.
- 1.17 **Language Translation** - The solution should have the functionality to have multiple language translations. Specifically, we would like to include the following languages in our solution: {Chinese, French, German, Korean, Japanese}. We currently use WPML plugin, and we are looking for a similar implementation.
- 1.18 **News Posting** - The solution should have the ability to post press releases, features stories and "what's new" content on the site. News content should have an auto-archiving functionality to archive posts after a specific time frame. The news should also have RSS feeds automatically available if desired by website visitors.
- 1.19 **Online Polling** - The solution should have the ability to create and provide a poll on the website. Depending on the poll settings, the poll will appear on the public website inside a polls widget. The functionality should include the ability to add, edit, import, export and copy the poll. The admin should be able to define poll categories and capture/display poll results.
- 1.20 **Staff Directory** - A staff directory with unlimited levels of divisions, departments, and groups, with options for expanded staff biographies and images; email addresses associated with directory listings shall be automatically obscured from automated methods email collection.
- 1.21 **Tagging** - Ability to tag any content and search, sort or view based on those tags.
- 1.22 **Third-Party Integration** - Ability to integrate with existing 3<sup>rd</sup> party applications.

## 2.12 ONGOING SERVICES

1. We are interested in understanding the ongoing services that you provide to all customers, such as:
  - 1.1 **Access to On-Demand Training Library** - Do you have an on-demand library of training videos and materials.
  - 1.2 **Annual Consulting Hours** - Do you offer a certain number of consulting hours as part of the base annual fee? Can these consulting hours be used each to help us keep our website fresh and engaging? For example, we may have mini-projects such as creating or redesigning buttons, refreshing images, etc.
  - 1.3 **Website Re-Design** - Do you offer a free site refresh at the end of our 4-year contract? What is included in the free redesign?
  - 1.4 **Training and Best Practice Webinars** - Do you offer regular training and best practice webinars?
  - 1.5 **Health Check Analysis** – Do you offer ongoing services to help us monitor the health and usefulness of our site?

- 1.6 **New User Training** – Do you offer scheduled and periodic training for new users?
- 1.7 **Site Analytics Reporting** - Do you offer ongoing assistance with helping us analyze our site statistics and recommending changes to make sure our websites continue to meet our business needs?

## 2.13 TECHNOLOGY/PLATFORM REQUIREMENTS

- 1.1 **Browser Support** – Edmonton Global is looking for a new website to support mobile and desktop versions of Apple Safari, Google Chrome, Edge, and Mozilla Firefox. The site should support the most recent versions of browsers and the versions prior.
- 1.2 **DDoS Mitigation** - The hosted solution should protect the website against Distributed Denial of Service (DDoS) and other cyberattacks and should be able to detect and mitigate malicious traffic within seconds. The solution should have smart detection technology that can identify the source and analyze the behaviour of the attack.
- 1.3 **Disaster Recovery** - In the event of an outage impacting the primary data center, the hosting solution must have a disaster recovery or backup data center where our website visitors will continue to access our site. The Recovery Time Objective (RTO) should be 60 minutes or less, and the data replication (Recovery Point Object or RPO) should be 15 minutes or less.
- 1.4 **Hosting Data Center and Backup Data Center** - The hosting platform must be in a certified data center with multiple layers of security access, redundant ISP providers, backup power and redundant generator, and firewall protection.
- 1.5 **Page Load Time** - The solution should ensure that pages load on an average of 1.5 seconds or less.
- 1.6 **System Uptime Guarantee** - The hosting platform should have a guaranteed uptime of 99.9% and be backed by a Service Level Agreement (SLA).
- 1.7 **Third-Party Plugins** – Edmonton Global will allow the Vendor to use third-party plugins where appropriate as potential solutions for a requirement.
- 1.8 **Content Delivery Network** – As most of our web traffic will be coming from international audience, the website should support or plan to support CDN.

## 2.14 MAINTENANCE AND SUPPORT

1. The Vendor's CMS, including all features and modular applications associated with the CMS, must have qualified and available support included as a part of ongoing services to maintain the CMS, using guidelines, structures and materials meeting the following criteria:
  - 1.1 **Support** - The Vendor would provide access to live support via email or phone during the Vendor's regular business hours. The support team must be fluent in the functionality and uses of both the content management system's features and associate applications and modules.
  - 1.2 **Support Materials** - 24/7 access to support materials including, but not limited to: online training manuals, support FAQs, customer support forums, instructional videos, informational newsletters, informational and support-driven webinars (live and archived), request forms, online education courses and support-related updates through common social networking mediums.
  - 1.3 **Support Service Level Agreement** - In all submitted proposals, vendors should be able to produce a Service Level Agreement that details guarantee customer support and a service escalation process. While website content updates are to be managed by Edmonton Global through the CMS, the Vendor must commit to regular maintenance and updating of the CMS and associated applications to keep the existing Software up-to-date as well as introduce new functionality and applications. Vendor shall commit to:

- 1.3.1 **CMS Development Process** - An internal process dedicated to reviewing new technologies and implementing development projects in order to provide a more robust CMS with additional features and applications.
- 1.3.2 **CMS Improvements** - Regular maintenance of the CMS to improve existing functionality and, when appropriate.
- 1.3.3 **CMS New Features** - Rolling upgrades of the solution that strengthen and update the CMS's functionality and associated applications.
- 1.3.4 **Software Service Level Agreement** - In all submitted proposals, vendors shall be able to produce a Service Level Agreement that details guarantees of upgrades and the dedicated process for improving the Software purchased by Edmonton Global, and a compensation structure when the terms indicated in the SLA is not met.

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## SECTION 3 - GENERAL TERMS AND CONDITIONS OF CONTRACT

### 3.1 SCOPE

Edmonton Global proposes that the following terms and conditions shall form a part of any contract entered into with the proponent.

### 3.2 DEFINITION OF TERMS

Whenever used in the agreement, the following words shall be deemed to have meanings as indicated below:

“Control” means that Edmonton Global has the authority to manage the Record, including its creation, use, disclosure and disposal.

“Contractor” means the party providing goods, services, or goods and services to the Owner.

“Custody” means that a party has physical possession of the Record.

“FOIPP Act” means the Alberta Freedom of Information and Protection of Privacy Act.

“Owner” means Edmonton Global.

“Proposal” means the offer of the Contractor to furnish materials, supplies or services in response to an RFP;

“Record” means information in any form, including proposals, reports, documents, drawings (computer generated or otherwise), specifications, photographs, letters, meeting minutes, vouchers and all other correspondence, papers and any other information that is written, photographed, recorded or stored in any manner, but does not include the software or any mechanism that processes such Records.

“RFP” means the Request for Proposal of Edmonton Global including all forms to be included as part of the Proposal;

“Sites” means all lands, buildings and premises where goods are to be delivered or services performed.

“Transitory Record” is one that:

- has only temporary usefulness,
- is not subject to legislated retention,
- is not required for operational purposes once its immediate purpose has been served.

Examples of Transitory Records are:

- Temporary information that can be destroyed once acted upon, (i.e. phone messages, routing slips, diaries, opened envelopes, and informal notes of little consequence)
- Draft documents and working materials are those Records used to prepare the master Record that is on file, (i.e. rough notes, preliminary drafts, dictating tapes, etc.)

### 3.3 TIME

Time is of the Essence.

### 3.4 ASSIGNMENT

This contract shall be binding upon the parties' respective successors obligations hereunder, upon written notice to the other party, to any of its subsidiaries and/or affiliated companies, without the consent of the other party. Furthermore, no work to be performed by the Contractor hereunder shall be subcontracted to or performed on behalf of the Contractor by any third party, except upon prior written permission by the Owner. As the Contractor, you will not assign this contract, in whole or in part, nor sublet this contract as a whole, without the Owner's prior written consent. The Owner shall have the sole right to assign the contract.

### 3.5 SUBCONTRACTS

No contractual relationship will be created between any subcontractor and the Owner. The Contractor agrees to bind every subcontractor by the terms of the contract, as far as applicable to the work of the subcontractor.

### 3.6 COMPLIANCE WITH LAWS

The Contractor shall be responsible for complying with all Federal, Provincial (Alberta), and Municipal laws, rules, regulations and guidelines that apply.

### 3.7 FINANCIAL

The Owner reserves the right to investigate the Contractor's financial position.

### 3.8 CONTRACTOR PERFORMANCE / DEFAULT

Upon becoming aware of potential or pending supply difficulties, the Contractor shall notify the Owner immediately of such difficulties before lack of supply of contracted products endangers the Owner's ability to supply products to user areas.

Upon such notification, the Owner shall be entitled to acquire the items from alternative sources, and the Contractor shall be responsible and shall indemnify the Owner for any associated costs or expenses.

If the Contractor:

- 3.8.1 is adjudged bankrupt, or makes a general assignment for the benefit of creditors, or if a receiver is appointed on account of the Contractor's insolvency; or
- 3.8.2 fails to make sufficient payments due to his creditors for labour, supplies or material used or reasonably required to carry out its obligations under this contract; or
- 3.8.3 disregards laws or ordinances, or the Owner's instructions; or

3.8.4 abandons its obligations under this contract; or

3.8.5 otherwise violates the terms and conditions of this contract,

the Owner shall, by written notice, instruct the Contractor to correct the default within five (5) business days. If the default is not corrected within five (5) business days, then the Owner may, without prejudice to any other right or remedy he may have, terminate the contract.

### 3.9 GOODS AND SERVICES TAX

The Owner is subject to Goods and Services Tax. All Goods and Services Tax shall be identified as a separate line item.

### 3.10 INDEMNIFICATION

The Contractor shall indemnify and hold harmless the Owner, its officers, directors, elected officials, employees, consultants and agents from any and all liabilities, claims, suits or actions, costs, damages and expenses (including costs on a solicitor and his own client basis) which may be brought or made or which they may pay or incur as a result of or in connection with the performance, purported performance or non-performance of the requirements of the Contract by the Contractor, its Subcontractors and Suppliers or anyone for whose acts the Contractor is responsible, or anyone of their respective employees or agents, provided such claims are caused by the negligent acts or omissions or breaches of contract or fault of the Contractor or of its subcontractors or suppliers, or anyone for whose acts the Contractor may be liable.

The Contractor shall indemnify and hold the Owner harmless with respect to all withholding and all other taxes or amounts of any kind relating to employment of any of the persons providing services to the Owner with respect to this contract.

### 3.11 COMMITMENTS

Nothing in this contract shall be construed as authority for the Contractor to make commitments, which shall bind the Owner to otherwise act on behalf of the Owner, except as the Owner may expressly authorize in writing.

### 3.12 PERSONAL INJURY / PROPERTY DAMAGE

The Owner shall not be liable or responsible for any bodily or personal injury or property damage of any nature whatsoever that may be suffered or sustained by the Contractor, its employees or agents, in the performance of this contract.

### 3.13 INSURANCE

The Contractor, shall, at the Contractor's own expense and cost, provide the Owner with the following applicable Certificate of Insurance, with an insurer licensed in Alberta, prior to the commencement of the contract:

November 16, 2021

- 3.13.1 Comprehensive general liability for an amount of not less than two million dollars (\$2,000,000.00) inclusive per occurrence.
- 3.13.2 Standard automobile insurance for all vehicles owned, licensed, or leased by the Contractor for an amount of not less than two million dollars (\$2,000,000.00) inclusive per occurrence.
- 3.13.3 Non-Owned vehicle insurance, for all applicable vehicles, coverage in an amount of not less than two million dollars (\$2,000,000.00) inclusive per occurrence.
- 3.13.4 If a professional consulting contract, Professional liability insurance for an amount of not less than one million dollars (\$1,000,000.00) inclusive per occurrence.
- 3.13.5 If a construction contract, Builders' All-Risk insurance for an amount equal to the value of the Work.

Unless stated otherwise, deductibles shall not exceed \$25,000.

### 3.14 WORKER'S COMPENSATION BOARD STATEMENT

The Contractor shall at all times comply with all the requirements of the Worker's Compensation Act of Alberta (the "Act"), amendments thereto, or any successor legislation; and shall upon notice by the Owner, provide evidence satisfactory to the Owner of said compliance with the Act within two (2) business days of request by the Owner.

### 3.15 LAW OF THE CONTRACT

The laws of the Province of Alberta shall govern the interpretation of the Contract and the parties hereto irrevocably attorney and submit to the exclusive jurisdiction of the Courts of the Judicial District of Edmonton in the Province of Alberta for any court proceedings that arise in relation to the Contract.

### 3.16 INDEPENDENT CONTRACTOR

The Contractor is an independent contractor in the performance of this contract. No employer/employee relationship will be created between the Owner and the Contractor, or between the Owner and the Contractor's employees, subcontractors or agents. No rights, privileges, benefits or compensation, other than those, which are expressly set out in the contract, will apply to the Contractor.

### 3.17 TERMINATION

The Owner, in its sole discretion, shall have the right, at any time, without cause, at its convenience upon thirty (30) days written notice, to terminate this contract. In the event of such termination, the Contractor shall be entitled to receive payment only to the date of termination in accordance with this contract. Such payment shall be in full and final satisfaction of any claims the Contractor may have under this contract.

### 3.18 ASSIGNMENT

Neither party may assign this contract or any of its rights or obligations hereunder without the prior written consent of the other party, and such attempted assignment shall be void.

### 3.19 ENTIRE AGREEMENT

This contract is the entire agreement between the parties and supersedes any and all previous agreements, statements, or representations of the parties and this contract may only be amended by written and signed agreement of the parties.

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**SECTION 4 - PRICING**

Identify proposed upset cost and payment schedule for carrying out the project. Submission should provide a full breakdown of costs and fees aligned with project deliverables.

**BID PRICE MUST BE IN CANADIAN DOLLARS.**

Addenda	Indicate Addendum Number	Acknowledgement
Addenda will be posted to the MERX website.	Addendum No. _____	Initial _____
	Addendum No. _____	Initial _____
	Addendum No. _____	Initial _____

SECTION 5 - CERTIFICATION

Failure to complete, sign and submit this certification, with the Proposal package, may disqualify this Proposal as set out in the RFP documents.

We  
(Legal Company Name)

Of  
(Business address)

\_\_\_\_\_

\_\_\_\_\_  
(Telephone number)

\_\_\_\_\_  
(Facsimile number)

Having examined and read the Proposal documents for RFP #\_\_\_\_\_ as issued by Edmonton Global, do hereby bid and agree to provide the services in accordance with the RFP documents, and do hereby agree to accept the terms and conditions set out in this Request for Proposal.

Executed this day of \_\_\_\_\_, 20\_\_\_\_\_

\_\_\_\_\_  
*Signature of authorized representative*

\_\_\_\_\_  
*(Print or Type) name and status of authorized representative*