

REQUEST FOR PROPOSAL: DATA MODERNIZATION AND AI DEVELOPMENT



August 2026

The materials contained in this Request for Proposal are strictly confidential and may not be distributed.

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ORGANIZATION AND BACKGROUND MATERIAL

ABOUT UTILITY SAFETY PARTNERS

Alberta One-Call Corporation, doing business as Utility Safety Partners (USP), is primarily concerned with safety and the prevention of damage to underground infrastructure and contact with overhead power lines. USP provides utility notification services (“Click Before You Dig”) to Alberta, Saskatchewan, and Manitoba. USP also acts as the trusted damage prevention hub in Alberta, dedicated to bringing stakeholders together to drive continuous improvement in damage prevention education, awareness, training, and industry best practice.

USP provides service to 1,090 registered Asset Owner Members across 3 provinces.

USP is a non-profit organization employing ~30 permanent staff and an additional 20-25 employees working in a seasonal capacity between March and November.

MISSION

We keep people, the environment and utilities safe through education, awareness, engagement and locates to prevent contact with overhead and underground infrastructure.

PROJECT BACKGROUND

OBJECTIVE

To position the organization for long-term success by building a secure, stable, scalable data-handling base upon which to build and develop Artificial Intelligence (AI) solutions that can be replicated and further developed for future business use cases.

USP expects to build out AI solutions that improve efficiency in the following areas:

- Automate repetitive tasks to increase employee capacity for more critical and impactful work
- Provide data trend analysis to support business decisions
- Enhanced / Augmented quality assurance and training
- Enhanced support for online users to ease the process of placing requests online
- Speed up ad hoc reporting

USP is committed to a phased approach to AI development, starting with an optimized database. We are looking for an established, stable vendor with extensive experience and expertise in organizational AI solutions and modernized databases. It is preferable that USP partners with a provider that can accomplish the initial database work and can provide coding and guidance for further AI development going forward.

OVERVIEW OF PRESENT ENVIRONMENT

USP uses several cloud-based solutions (SaaS) to provide services including:

- Five9 – Virtual contact centre (Data includes recorded calls, performance reports, call statistics)
- Pelican One Call Access and Data Portal – locate request creation software (Data includes recorded details of every request processed, number and date of locate requests by area or by date range, registered location data for individual asset owners, contact information for registered members)
- Intercom CRM
- Sage Accounting Software

Data is currently stored in Sharepoint, File Server, and Datto Workspace (Azure)

Monthly reporting currently requires downloading information from all sources and amalgamating it into reports. Ideally, we will create an optimized data environment that automatically consumes the data to allow us to build reports and analyze operational functions from one place.

OBJECTIVES/SCOPE OF WORK

The USP AI project includes the following objectives as phased outcomes:

- Analyze current data silos, data use and integrity and make recommendations and a plan to organize the data into useable mesh/lake/warehouses to achieve our AI goals.
- Increase Operational efficiency: reduce manual data collection and curation. Build a data foundation that automatically consolidates and optimizes structured and unstructured data from multiple sources through metadata and/or ETL pipelines into a single, scalable, and organized continuously updated layer
- Secure content and AI functionality in accordance with USP's IT Governance and AI Governance policies and applicable regulations.
- AI Readiness: structure the incoming data by identifying gaps, data bias, and duplication, "bad" data into clean data, optimized for AI report building, data analysis, Machine Learning / Language Learning Models and other AI driven processes deemed beneficial to operations.
- Regression analysis (fine tuning) to monitor and evaluate effectiveness of data and AI solutions
- Build out layered AI solutions
- Ongoing support following implementation to expand AI functionality

LIABILITY AND RESERVED RIGHTS

This RFP does not commit USP to pay any cost incurred in the preparation or submission of any proposal, or to procure or contract for any services. USP may, at its sole discretion, reject any or all proposals received, or waive minor defects, irregularities or informalities therein.

USP reserves the right to amend this RFP by an addendum issued up to ten business days prior to the date set for receipt of proposals. Addenda or amendments will be mailed or emailed to all bidders that have copies of the RFP. If revisions are of such a magnitude to warrant the postponement of the date for receipt of proposals, then an addendum will be issued announcing the new date.

GENERAL PROCEDURES

This section outlines specific instructions for proposal submission. A bidder that does not adhere to these instructions may be subject to disqualification without further consideration.

ISSUING AUTHORITY

This RFP is issued on behalf of Alberta One-Call Corporation, dba Utility Safety Partners by:

Sher Kirk, Operations Director

Address: PO Box 87131, Douglas Square RPO, Calgary AB, T2Z 3V7

Cell: (403) 479-4732

Email: SLKirk@UtilitySafety.ca

PRICE GUARANTEE

Bidder must guarantee its prices for a period of six months, beginning on the date of submission of the response to this RFP. The Bidder must also guarantee their prices will not escalate greater than 5% annually for the first five years of service unless the Bidder and USP agree in writing.

PREPROPOSAL QUESTIONS

Bidder must submit questions in writing to:

Sher Kirk, Operations Director

AI Project RFP

PO Box 87131, Douglas Square RPO

Calgary AB T2Z 3V7

Email: SLKirk@UtilitySafety.ca

All questions must be received by September 11, 2026, to allow for USP's response.

RFP QUESTIONS AND CLARIFICATIONS

Vendors shall aggregate their requests for clarification and submit them via email to SLKirk@UtilitySafety.ca. **Contact should be no later than 5:00 pm MDT on September 11, 2026.** Such requests for clarification, and USP's response, will be supplied in writing to all parties that have received copies of the RFP, without identifying the source of the inquiry.

RESPONSE GUIDELINES

COVER LETTER

The proposal must be accompanied by a cover letter, signed by an individual authorized to bind the proposed entity.

VENDOR PROFILE AND DEMOGRAPHICS

Provide a statement giving a brief history of your company, how it is organized, and how its available products and resources will be used to meet USP's requirements. The vendor shall submit the following information:

- The company's official name and address. The vendor shall also indicate what type of entity it is — for example, a corporation or a partnership.
- The name, address, and telephone number of the person who receives correspondence and who is authorized to make decisions or represent the vendor. Please state his or her capacity within the company.
- The total number of years the vendor has been in business and, if applicable, the number of years under the present business name. If the vendor's core business is not AI or Data Optimization, please indicate the number of years the company has operated in this space.
- The total number of clients to which the vendor provides similar / same services. Provide references where available.

FINANCIAL INFORMATION

The vendor shall provide a complete set of audited financial statements for the past three years. All financial statements should be prepared to generally accepted accounting principles. Each vendor should note that USP reserves the right to purchase credit reports and additional financial information as it deems necessary. The vendor shall also provide a copy of its corporate annual report.

In the case where the vendor is not a public company, the vendor must provide financial statements that can be used during the evaluation to determine the financial viability of the vendor.

PROPOSAL FORMAT

The complete proposal must include the proposal document with a point-by-point description of how the solution will meet each Objective (SOW/Objectives above) of this RFP. Provide responses to all questions in Sections A, B, and C as well as all other materials requested. Bidder may include any additional materials it feels could assist in the evaluation of its proposed systems; however, the bidder must provide complete responses to each objective.

Proposals that do not follow the RFP's format and content requirements will be subject to rejection without appeal.

Proposals may be submitted by mail (hard copy) or by email (soft copy). If the bidder chooses to submit its proposal by mail, two complete and identical copies of the proposal are required.

PROPOSAL DUE DATE

All proposals must be received by 5:00 pm EDT on October 2, 2026, and will be labeled: "Response RFP for Data Modernization and AI development".

PROPOSAL DELIVERY

Bidder is requested to submit the proposal to the following contact shown:

Sher Kirk,
Operations Director

Utility Safety Partners
PO Box 87131
Douglas Square RPO
Calgary AB T2Z 3V7
Email: SLKirk@UtilitySafety.ca

PROPOSAL INCLUSIONS

All equipment, accessories, database information, training, software, hardware, labour and materials must be furnished for the installation in a bill-of-materials format. Any additional material or equipment necessary for installation, operation and maintenance of the system(s) not specified or described herein will be deemed to be part of the bidder's proposal.

STANDARD AGREEMENTS

Bidder must provide a copy of its standard product agreements.

PROPOSAL MODIFICATION AND WITHDRAWAL

Once the proposal is submitted, bidder may modify or withdraw it only by appropriate notice to USP. Such notice will be in writing over the signature of the bidder. A bidder may resubmit a withdrawn proposal up to the time designated for the receipt of proposals, provided it fully conforms to the general terms and conditions of the RFP.

CONFIDENTIALITY

Proposals submitted to USP for consideration will be held in confidence and will not be made available to other bidders for review or comparison. Proposals submitted and terms and conditions specified in each bidder's bid response will remain the property of USP.

All information in this RFP is confidential and will not be disclosed to anyone other than those responding to this RFP. Bidder may designate the portions of the proposal that are proprietary in nature, and USP agrees not to disclose those portions except for the purpose of evaluating the proposal.

CALENDAR OF EVENTS

Table 1 reflects the project schedule.

Table 1. Project Schedule

Activity	Primary Responsibility	Date (Date Month Year)
RFP released to bidders	USP	25 August 2026
Bidder's acknowledgment of intention to bid	Bidder	11 September 2026
Provide final questions by deadline	Bidder	11 September 2026
Proposal delivery and opening	Bidder /USP	2 October 2026
Evaluation	USP	2 October 2026 – 23 October 2026
Finalist Presentations (if requested)	USP / Bidder	2 October 2026 – 23 October 2026
USP notifies bidder/provider of its selection as winning bidder	USP	30 October 2026
Contract negotiations completed	Bidder / USP	30 October 2026 - 20 November 2026
Final contract signed	Bidder / USP	27 November 2026
Project planning and sign-off	Bidder and USP– Implementation Team	11 December 2026
System development and testing	Bidder with Western Canadian One Call Centres Implementation Team	11 January 2027 – 16 April 2027

Source: USP August 2026

TREATMENT OF INFORMATION

All information about USP provided during the RFP process shall remain under nondisclosure and cannot be released without the express permission of USP.

SECTION A — ARCHITECTURE AND TECHNOLOGY REQUIREMENTS

ARCHITECTURE

- Provide a description of your proposed solution architecture, including network and component diagrams. Include a description of the network requirements for line and port sizing.
- Describe the physical, environmental and power requirements of your proposed solution.
- Describe how this solution supports future growth and scalability
- Describe how system and customer data integrity is maintained in the event of a failure in one of the system's components.
- Describe the scalability of system in terms of the number of concurrent agents, volumes of incoming and outgoing data, new datasets, requests from the clients to the data server, etc.

TECHNOLOGY COMPONENTS

- For Web-based applications, what browsers are supported, and at what version levels? Describe the thin client technology used, if any.
- Describe the recommended network and endpoint configurations for employees who work remotely. Include any specialized agent management tools.
- How will your system interface to our existing environment?
- Describe the information available in your system logs.
- Describe how your system integrates with third-party databases (for example, support for ODBC/JDBC-compliant databases, integration with other web-based applications (examples: VOIP, CRM software) access via API, Web services and so forth).
- How many database connections can be open at one time?
- Describe your company's policy for managing system maintenance. Is there a window when the system will be down for maintenance and unavailable to the users? Is this a static time weekly or monthly? How are other periods of unavailability conveyed to our company?
- Describe your solution's system backup and recovery features and the components to consider for disaster recovery.
- Describe your solution's ability to integrate with virtual contact centre systems. (Example: Links recorded call to ticket number(s) or call data)

SECURITY

- Describe the security integration with multiple firewalls.
- Describe how user logins are authenticated.
- Describe the security embedded in the proposed solution.
- Describe how your system supports different access security levels. (*config)
- Describe your system's data encryption capabilities.
- Describe your system's communications transmission encryption capabilities.
- Describe how your solution can provide secure connections to our customers.
- Describe how security is managed for remote employees connecting with the central server.
- Describe how your company's security policies are compliant with any relevant industry standards.
- Describe how customer data is protected, including how you ensure that customer data is not available to other customers and/or internal employees.

MANAGEMENT TOOLS

- Describe your solution's management tools, including:
 - System performance monitoring tools. System performance diagnostics and troubleshooting tools.
 - Tools for monitoring and filtering of alarms, faults and associated logs.
 - Administrative tools for designing work flows – ability to rename or move fields within the interface?
- Debugging tools
- Tools for providing real-time statistics regarding system performance, including checking server and process status
- Describe your system's ability to support secure remote access for troubleshooting methodology.
- Describe your system management tools' key performance indicators (KPIs), including any green/yellow/red threshold alarming that is prebuilt into the system and configured with defaults that can be changed. List everything that can be monitored and alarmed.

- Describe how you report outages — either partial or complete outages.
- Describe how you keep users updated as to expected recovery time in the event of an outage.
- Describe how your company keeps geographically diverse servers synchronized.
- Describe your system's ability to allow remote administration by users.
- Describe your system's ability to support analog failover.
- Describe how your company's solution supports application "version management," such that system managers and supervisors can revert to a previous version of an application or otherwise "undo" a change made to system functionality.

REPORTING

- Describe your system's ability to provide real-time monitoring and reporting of activity,
- Describe how access to specific real-time reporting data can be limited to specific users.
- Describe all summary statistics and standard real-time reports available.

SECTION B — IMPLEMENTATION AND TRAINING

SYSTEM INSTALLATION

- Describe your implementation strategy, including:
 - Methodology used to analyze current environment
 - Average time frame of implementation
 - Responsibilities of USP during implementation
 - Resources required from USP
- Identify who will be responsible from your organization for the implementation?
- Describe the experience of your company's staff in deploying solutions similar to the one proposed for USP.
- Describe your company's ability to provide pre-installation and post-installation consulting.
- Describe any services that your company offers to complement the proposed solution.
- Describe your company's project management methodology.

- Describe the key deliverables your project team typically provides.
- Identify and describe the role of any third parties that your company plans to employ to implement all or specific parts of the proposed solution.
- Describe your company's process for documenting the system deployment, including relevant system configuration and customization.
- Describe the best practices that your company employs to realize maximum benefits during initial implementation.

TRAINING

- Provide an overview of your company's customer training program. Include:
 - Where and how the training is conducted
 - Courses and/or documentation available to the customer
 - Options for customized training
 - Train-the-trainer programs
 - Online training options

SYSTEM MAINTENANCE AND SUPPORT

- Does your support include dedicated resources / account manager?
- Describe how your company's customer service is organized and how it operates. Include:
 - Options for help desk availability and response times
 - How the help desk is reached
 - Process for handling escalations
 - Availability and requirements for remote support
- Describe how support will be provided and coordinated for any aspects of your solution that are to be supported by a third party.
- List all training and support documentation that will be provided for online users, agents and administration staff. Indicate if the documentation will be accessible online and how often documentation is updated.

- Describe your company's maintenance offerings. Include:
 - Options for varying levels of support agreements
 - Whether upgrades are included in the maintenance fees
 - How and how often upgrades are conducted
- Describe the responsibilities your company takes to implement patches or updates.
- Describe test environment resources available for pretesting any proposed changes to the system. How does the test environment support end-to-end testing?

SECTION C — PRICING

PRICING

- Note that preference will be given to vendors with a pricing model in Canadian Dollars (CAD)
- Describe the system and user application licensing model for the proposed solution and provide a table or spreadsheet in editable electronic format with all pricing information showing line-item detail for any item that has a separate price, even if the item is sold as part of a bundle. Specify currency.
- Column headings should reflect:
 - Item description (specify named agent versus concurrent agent pricing models for items based on agent licenses)
 - List price
 - Discount amount
 - Net unit price
 - Quantity
 - Total net price
- Provide pricing for the following components:
 - Software
 - Hardware

- Install/professional services
- Training services
- Support – preference will be given to vendors with a static support fee which does not increase by more than 3% annually.
- Describe any front-end costs that may be associated with your deployment.
- How are professional services fees for design and installation charged? Is there a front-end fee, or are the costs embedded into monthly charges?
- Describe any system uptime and service response time SLAs and penalty structure for noncompliance.