
Request for Proposals (RFP)

Consultant to Conduct an Enterprise Data Audit & AI Readiness Assessment

Introduction

The Ontario Centre of Innovation (OCI) is seeking proposals from qualified consultants to conduct an enterprise data audit of OCI's information environment, including its application management system, financial management/ERP system, customer relationship management (CRM) system, other business-managed data sources, and related integrations.

OCI is introducing enterprise generative Artificial Intelligence (AI) capabilities to support employee productivity, communication, knowledge access, analysis, and other approved business use cases. Over time, OCI may expand its use of artificial intelligence to include more advanced AI augmentation, AI-analytics, AI-enabled business processes, intelligent workflow automation, multi-step or agentic workflows, and other emerging enterprise AI capabilities. Accordingly, this engagement is intended to establish a sufficiently comprehensive and reusable enterprise data, integration, and AI-readiness baseline to support future AI capabilities without requiring OCI to repeat the foundational enterprise data audit as its AI strategy evolves.

The engagement will assess whether OCI's data is sufficiently consistent, accessible, and appropriately structured to support the responsible and effective use of AI, analytics, and automation. The selected consultant will provide an evidence-based assessment of OCI's current data environment and a practical remediation roadmap, working with OCI management, IT, and data owners.

Background

For over 39 years, OCI has supported Ontario's innovation ecosystem by bringing together industry, academic, and government partners to co-invest in R&D, technology development, and commercialization. OCI is a non-profit organization funded by the Government of Ontario and the Government of Canada.

Website: www.oc-innovation.ca

Scope of Work

The consultant will conduct a review of OCI's priority data environment through documentation review, system analysis, representative data profiling, and consultation with data owners.

1. Discovery, Data Inventory & Ownership

- Confirm priority use cases, in-scope systems, business processes, stakeholders, and data-access requirements.

- Inventory key systems, datasets, integrations, reports, files, and other material data sources, identifying ownership and authoritative sources.
- Develop a practical data inventory documenting key data characteristics and known limitations.

2. Data Quality & Format Assessment

- Assess representative datasets for material data quality, consistency, completeness, and usability issues.
- Evaluate whether structured and unstructured data is appropriately organized and formatted for analytics, AI, and automation.
- Identify significant issues, likely root causes, and practical methods for measuring and monitoring data quality over time.

3. Integration, Lineage & Master Data

- Assess data flows, integrations, lineage, and system-of-record responsibilities across OCI's application management, financial management/ERP, CRM, and related systems.
- Identify integration, record-linking, reconciliation, and data consistency issues that may affect reporting or AI use.
- Recommend practical improvements to master data, reference data, metadata, integrations, and authoritative data sources.
- Identify architectural or integration improvements required to support secure, scalable, auditable AI integration over time.

4. AI & Analytics Use-Case Readiness

The consultant will assess OCI's readiness for priority use cases, including:

- Application and program assistants.
- Enterprise data warehouse, reporting, dashboards, analytics, forecasting, and performance measurement.
- Enterprise search, document retrieval, summarization, and knowledge assistants.
- Document processing and workflow automation.

For each use case, assess:

- Availability, quality, structure, and accessibility of required data.
- Ability to integrate data and identify authoritative sources.
- Required remediation and controls before implementation.

Each use case will be rated **ready, conditionally ready, or not ready**, with supporting evidence and recommended next steps.

5. Remediation Roadmap & Target State

- Develop a prioritized remediation roadmap addressing material data quality, integration, governance, documentation, access, and security issues.
- Identify quick wins, foundational improvements, and longer-term initiatives over approximately 6–18 months.
- Recommend practical target-state principles for supporting trusted analytics, data warehousing, and AI use.
- Identify candidate pilot use cases and minimum requirements for proceeding.

6. Final Report & Presentation

The consultant will:

- Deliver a final report summarizing the current state, key findings, AI and analytics readiness, risks, and prioritized recommendations.
- Provide reusable supporting materials, including the data inventory, readiness assessment, issue register, and remediation roadmap.
- Present findings to OCI management in an up to two-hour session and participate in one follow-up Q&A session.

Key Deliverables

- Confirmed audit plan, scope, and secure data-access approach.
- Inventory of priority systems, datasets, integrations, owners, and authoritative sources.
- Data-quality assessment and prioritized issue register.
- Data-flow and lineage assessment.
- AI and analytics use-case readiness matrix.
- Target-state recommendations and 6–18 month remediation roadmap.
- Final report, presentation deck, and management presentation.

Consultant Qualifications

Proponents should demonstrate:

- Experience conducting enterprise data audits, data governance/quality reviews, or AI-readiness assessments, preferably in public-sector, non-profit, financial, funding, or other data-sensitive environments.
- Demonstrated experience with enterprise GenAI readiness, including Anthropic Claude, OpenAI ChatGPT, Microsoft Copilot, or comparable enterprise AI platforms.
- Experience working with structured and unstructured data across application management, financial/ERP, CRM, and related enterprise systems.
- Strong knowledge of data architecture, integrations, analytics, data warehousing, AI, automation, and data governance.
- Understanding of Canadian/Ontario privacy, security, records-management, and public-sector requirements.

- Ability to work securely with sensitive information and communicate technical findings clearly to business and management audiences.

Proposal Requirements

Proposals should include:

- **Proponent information:** Company and contact information, project team, roles, experience, and availability.
- **Relevant experience:** Understanding of OCI's objectives and examples of comparable engagements.
- **Approach and workplan:** Proposed methodology, timeline, milestones, stakeholder requirements, assumptions, and quality-assurance approach.
- **Security and tools:** Proposed data-access, storage, security, third-party tools, and any use of AI in delivering the engagement.
- **Pricing:** Fixed fee in CAD by phase or deliverable, including assumptions, exclusions, optional services, and applicable taxes.
- At least two comparable client references and disclosure of actual or perceived conflicts of interest.

Evaluation Criteria

Proposals will be evaluated using the following weighted criteria:

- Experience, qualifications, and relevant references – 30%
- Proposed approach, methodology, security/privacy controls, and ability to meet timelines – 40%
- Cost effectiveness and clarity of pricing and assumptions – 30%

OCI may request clarification, demonstrations, or interviews with shortlisted proponents.

Timeline

- **RFP issue date:** Monday, August 31, 2026
- **Proposal submission deadline:** Friday, September 11, 2026
- **Expected engagement duration:** Approximately 10 -12 weeks from kick-off, subject to the selected workplan and OCI availability.

OCI reserves the right to adjust this schedule.

Contract Terms and Conditions

- OCI reserves the right to award all, part, or none of this solicitation and is not required to accept the lowest-cost proposal.
- Changes to scope, schedule, staffing, or cost require written OCI approval.
- Payment will be made against approved invoices and agreed contract milestones.
- Travel and related expenses require prior written approval.

- Vendors must protect OCI information, apply appropriate access controls, and use OCI-approved storage and processing environments.
- Non-public OCI information may not be removed, reused, or disclosed without prior authorization and must be returned or securely destroyed at the end of the engagement.
- Vendors must comply with applicable laws, contractual requirements, OCI policies, and applicable cybersecurity expectations.
- OCI will own OCI-specific deliverables and work products, subject to any pre-existing vendor intellectual property identified and agreed to in the contract.
- Proponents must disclose actual or perceived conflicts of interest.

Use of AI Tools

Any AI tools or services used in delivering the engagement must:

- Comply with OCI's applicable GenAI and data-handling policies.
- Not transmit non-public OCI information to public, consumer, shared-training, or otherwise unapproved AI services without prior written consent.
- Be disclosed in the proposal, including the provider, hosting/data-residency approach, data processed, and intended use.
- Include appropriate human review, quality assurance, and traceability.

Submission Instructions & Contact Information

Proposals must be submitted by email by **4:00 p.m. EST on Friday, September 11** to:

Carmela Mendoza

Administrative Coordinator
Ontario Centre of Innovation
cmendoza@oc-innovation.ca

All bids will be acknowledged with a return receipt.

Questions may be submitted by email to Carmela Mendoza. OCI may share responses with other potential bidders where appropriate.

Confidentiality

All information provided by or obtained from OCI in connection with this RFP, including intellectual property and non-public information, is the property of OCI and must be treated as confidential.