

TO:	CHAIR AND MEMBERS CORPORATE SERVICES COMMITTEE MEETING ON JANUARY 23, 2018
FROM:	MAT DALEY DIRECTOR, INFORMATION TECHNOLOGY SERVICES, FINANCE AND CORPORATE SERVICES
SUBJECT:	IMPLEMENTATION SERVICES TO MIGRATE EXISTING MICROSOFT REPORTS TO MICROSOFT BUSINESS INTELLIGENCE (BI) REPORTING SERVICES

RECOMMENDATIONS

That, on the recommendation of the Director, Information Technology Services, Finance and Corporate Services, the following actions **BE TAKEN** with respect to the selection of an implementation partner to migrate existing Microsoft Reports to Microsoft Business Intelligence Reporting Services for the City of London:

- a) The proposal submitted by Dimensional Strategies Inc. (DSI), 503 – 5450 Explorer Drive Mississauga, ON L4W 5N1 for Implementation Services to Migrate Existing Microsoft Reports to Microsoft Business Intelligence (BI) Reporting Services at their proposed fees of \$293,625.00 excluding HST, **BE ACCEPTED** in accordance with the Procurement of Goods and Services Policy;
- b) The financing for the project **BE APPROVED** in accordance with the “sources of Financing Report” attached hereto as Appendix “A”;
- c) Civic Administration **BE AUTHORIZED** to undertake all administrative acts that are necessary in connection with this purchase;
- d) Approval herein given **BE CONDITIONAL** upon the Corporation entering into a formal agreement or having a purchase order, or contract record relating to the subject matter of this approval; and,
- e) The Mayor and City Clerk **BE AUTHORIZED** to execute any contract, statement of work or other documents, if required, to give effect to these recommendations.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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- None

BACKGROUND

Purpose

The purpose of this report is to seek approval from Committee and Council to award Dimensional Strategic Inc. (DSI) at the proposed fees of \$293,625.00 excluding HST, a contract for the implementation and support of the migration of all existing Microsoft Reports to Microsoft Business Intelligence (BI) Reporting Services.

Background

Currently there are several reporting solutions used within the City of London that provide primarily application-based reporting often customized for a specific Service Area. Some of these reporting solutions are reaching end of life and improvements or enhancements cannot be made to meet the needs of the users. The migration of existing Microsoft Reports represents the first phase of the City's journey to implement a new Business Intelligence (BI) platform and will address the identified end of life issues while also laying the foundation for enhanced business reporting. Future phases will include the creation of reporting solutions for new applications such as the Computerized Maintenance Management System (CMMS), migration of other application-based reporting solutions, and development of a Power BI Gateway to provide secure data transfer between cloud-based Power BI services and on premises data sources. The BI platform will provide the framework to enable service areas to make faster, better informed business decisions.

The implementation of the Business Intelligence platform aligns with the delivery of the following elements of the 2015 – 2019 Strategic Plan for the City of London: Leading in Public Service – create, explore, and implement new technologies or technology improvements to assist in the management of Corporate assets, Financial and reporting systems, and Billing systems.

Discussion

The City of London and DSI will address the end of life challenges in over 1500 reports across the Corporation through the following actions: Microsoft BI platform setup, platform configuration, report migration, training, testing, and production deployment. It is estimated that the first phase of the implementation of the Microsoft Power BI platform will conclude in Q3, 2018. Future phases will utilize appropriate competitive bidding processes to source qualified implementation partners.

Microsoft Power BI is a suite of business analytics tools providing self-service business intelligence capabilities as well as data warehouse opportunities. Power BI is easy-to-use, supports a full range of analytic workflow capabilities, and has the ability to connect to hundreds of data sources. Power BI offers data warehousing capabilities such as data preparation, data discovery and interactive dashboards. The Microsoft Power BI platform is a flexible solution that will support on premises reporting as well as hybrid and cloud-ready reporting solutions.

Microsoft Power BI has been recognized as a leader in Business Intelligence and Analytics. According to industry analysts, the strengths of Microsoft Power BI are: low total cost of ownership, ease of use, complexity of analysis, strong user community and Microsoft's future vision for the platform. In September 2017, technology experts selected Microsoft Power BI as the Editors' Choice in the self-service BI tool review roundup indicating that Microsoft 'has done an excellent job of building a powerful, highly intuitive business intelligence tool with standout data visualization capabilities and excellent integration with the rest of the Microsoft Office Suite'.

Dimensional Strategies Inc. holds the following Gold competencies from Microsoft: Application Development, Cloud Platform, Data Analytics and Data Platform. DSI was recognized by Microsoft Canada as the top Data Analytics Partner in 2016. DSI has provided implementation services to the City of Mississauga, Hamilton Wentworth District School Board as well as several corporations such as Carlsberg Canada and Clorox Canada.

The Regional Municipality of York and City of Brampton are currently using Microsoft Power BI. York Region has implemented a similar strategic approach as is being recommended in this report.

Project risks will be mitigated using contract management, milestone-based scheduling, approvals and payments, and project management best practices.

Purchasing Process

A formal RFP was issued in October, 2017, to source qualified implementation partners to assist with the delivery of the first phase of the City's Business Intelligence (BI) platform strategy. The

scope of the RFP included resources to provide project management, technical and functional consulting, training and other requirements.

After the RFP was posted on bids&tenders™, six (6) addendums were issued to respond to questions, inquires and clarification requests. There were eleven (11) plan takers registered. Two (2) proponent submissions were received and both submissions were compliant.

A two-envelope RFP process was employed, one envelope containing the technical proposal and the second envelope containing the pricing for the work. Four (4) evaluation committee representatives from Information Technology Services, Neighbourhood, Children, and Fire Services as well as Parks and Recreation Services evaluated and assessed the two (2) submissions.

Financial Impact

The Business Intelligence Project was approved as part of the 2017 Capital Budget. The Source of Financing for the first phase of the BI project is attached as Appendix “A”. The proposed one-time cost for phase one is \$293,625.00 excluding HST.

Conclusion

The proposal submission from Dimensional Strategies Inc. (DSI) was the overall highest-scoring proponent which met the noted evaluation criteria, all terms, conditions, specifications and requirements, displayed an understanding of the work, and possesses the technical expertise required. It is recommended that Dimensional Strategies Inc. be awarded the contract.

Acknowledgements

The evaluation team consisted of Lori Kolodiazny, Finance and Corporate Services, John Nolan, Neighbourhood, Children and Fire Services, Scott Oldham, Parks and Recreation Services, Stanko Vucetic, Finance and Corporate Services, and Mary Ma, Procurement Officer, Purchasing and Supply.

This report was prepared with the assistance of the evaluation team members as well as Alan Dunbar, Finance and Corporate Services, Lisa Karlovcec, Finance and Corporate Services, David Munteer, City Solicitor’s Office and Marta Semeniuk, Finance and Corporate Services.

PREPARED BY:	RECOMMENDED BY:
LORI KOLODIAZNY, MANAGER, INFORMATION TECHNOLOGY SERVICES, FINANCE AND CORPORATE SERVICES	MAT DALEY, DIRECTOR, INFORMATION TECHNOLOGY SERVICES, FINANCE AND CORPORATE SERVICES

Attach: Appendix A – Source of Financing

cc: Mary Ma, Procurement Officer

APPENDIX 'A'

#18010
January 23, 2018
(Award Contract)

Chair and Members
Corporate Services Committee

**RE: Implementation Services to Migrate the Existing Microsoft Reports to
Microsoft Business Intelligence (BI) Reporting Services
(Subledger NT18CP01)
Capital Project GGAPPL1801 - Business Intelligence Reporting
Dimensional Strategies Inc. (DSI) - \$293,625.00 (excluding H.S.T.)**

FINANCE & CORPORATE SERVICES REPORT ON THE SOURCE OF FINANCING:

Finance & Corporate Services confirms that the cost of this project can be accommodated within the financing available for it in the Capital Works Budget and that, subject to the adoption of the recommendations of the Director, Information Technology Services, Finance & Corporate Services, the detailed source of financing for this project is:

<u>ESTIMATED EXPENDITURES</u>	<u>Approved Budget</u>	<u>Committed To Date</u>	<u>This Submission</u>	<u>Balance for Future Work</u>
<u>GGAPPL-Application, Data, Information & Process</u>				
Consulting	\$841,049	\$413,418		\$427,631
Computer Equip. - Business Intelligence Reporting	298,793		298,793	0
Balance of City Related Expenses Available	4,413,063	1,575,767		2,837,296
NET ESTIMATED EXPENDITURES	<u>\$5,552,905</u>	<u>\$1,989,185</u>	<u>\$298,793</u> 1)	<u>\$3,264,927</u>
<u>SOURCE OF FINANCING:</u>				
Capital Levy	\$3,823,001	\$1,939,465	\$298,793	\$1,584,743
Drawdown from Technology Reserve Fund	1,680,184			1,680,184
Capital Receipts	49,720	49,720		0
TOTAL FINANCING	<u>\$5,552,905</u>	<u>\$1,989,185</u>	<u>\$298,793</u>	<u>\$3,264,927</u>

Financial Note:

- 1) Contract Price
Add: HST @13%
Total Contract Price Including Taxes
Less: HST Rebate
Net Contract Price

GGAPPL1801

\$293,625
38,171
331,796
33,003
\$298,793

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Jason Senese
Manager of Financial Planning & Policy