



**CVRD**

**Cowichan Valley Regional District**

**Records Management Assessment**

**Request for Proposal**

**Closing Date: September 6, 2016 at 9 am**

# 1. INTRODUCTION

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## 1.1 Invitation

The Cowichan Valley Regional District (CVRD) is seeking proposals from qualified respondents to conduct an assessment of the regional district's records management system, present findings, develop a plan for organization and retrieval improvements to address gaps in the short term, and provide recommendations on appropriate methods and resources to expand the current system across all departments.

## 1.2 Closing Date and Time

The proposal is to be submitted electronically in PDF format to [jbarry@cverd.bc.ca](mailto:jbarry@cverd.bc.ca) with the subject line reading **Records Management Assessment RFP** no later than 9:00 am PDT on Tuesday, September 6, 2016. The date and time stamp on the CVRD's received email will be the official submission time. Proposals received after the closing time will not be considered.

## 1.3 Inquiries / Contact Information

Any inquiries regarding the Records Management Assessment RFP are to be directed to **Joe Barry, Corporate Secretary** via telephone at 250.746.2506 or by email at [jbarry@cverd.bc.ca](mailto:jbarry@cverd.bc.ca).

## 1.4 Background

The CVRD provides local government services to approximately 85,000 residents in nine electoral areas and four municipalities. There are approximately 175 functions which are managed by four departments: Community Services, Corporate Services, Engineering Services, and Planning/Development. The number of full time equivalent employees is 220.

The regional district's Duncan office is where the majority of the corporation's physical files are stored. Files are also stored at four recreation/ community centres; three recycling/garbage drop-off depots; and six volunteer fire departments. Archived physical records are stored off-site at a rented facility in Duncan.

## 1.5 Purpose & Scope of Work

The purpose is to conduct an assessment of the Regional District's established records management program, current practices and existing training materials; making recommendations for improvements; and providing solutions to address immediate issues.

The CVRD currently uses SIRE records management software based upon the Local Government Management Association's Records Classification and Retention Schedule.

It is expected that the successful proponent will attend on site to formally review the regional district's records management processes and records locations; and conduct interviews with appropriate staff as required; in order to conduct a thorough evaluation.

## **1.6 Deliverables**

Working with the support and assistance of the Corporate Secretary, General Managers and other staff as needed, the successful proponent will assess the current state of the regional district's records management program throughout the organization at all facilities.

The successful proponent is to develop a work plan for the organization recommending improvements to address gaps in the short term; address long term requirements to manage paper and digital records across all departments; and recommend improvements to existing training materials. The work plan is to include an analysis of how to apply current staffing resources to meet short and long term goals.

## **2. FORMAT OF PROPOSALS & PROPOSAL EVALUATION**

### **2.1 Proponent Overview**

The proposal shall provide a general overview of the proponent, its structure, size and capability to perform the work required. This section should specifically highlight recent and relevant project experience that demonstrates the proponent's suitability to undertake the scope of work. A minimum of three references relating to relevant project experience should be provided, including contact name and details of the projects.

### **2.2 Project Team & Experience**

The proposal shall clearly identify the proposed team members that will perform the work, and indicate the level of involvement of each team member in the proposed work. This section should address team structure and organization, and also demonstrate how the team members identified have the requisite experience to perform the work. Resumes of all team members should be included in an Appendix to the proposal.

### **2.3 Proposed Methodology**

The proposal shall clearly describe in detail the proposed methodology, taking into account all requirements of the RFP. This section should address the work effort and team member participation and role in delivering the work. The proposed methodology should also identify any potential options, or changes to the outlined approach that could be advantageous to the CVRD. Any such changes and optional work should be identified specifically, or outlined in a separate section.

### **2.4 Work Schedule and Fee**

The total proposed cost of the project shall include:

- a. An all-encompassing fee showing a breakdown of proponent fees, any and all disbursements with applicable taxes listed separately, sub-consultants' fee (if applicable), billable rates for staff assigned to this project, or other expenses as required under Scope of Work.

- b. Work schedule to show cost of each major part and key tasks to complete the project and overall timelines required.

## 2.5 Projected Deliverables

The proponent will clearly identify in the proposal, specific project milestones, check-in points and deliverables.

## 2.6 Proposal Evaluation and Selection Criteria

A selection committee comprised of key regional district personnel will review all proposals and identify the proposal (if any) that offers the best value to the CVRD. To assist with this, the selection committee intends to conduct an evaluation of each proposal based on the evaluation criteria and format outlined below:

Category	Maximum Points	Details
Company and Project Team Qualifications	35	<ul style="list-style-type: none"> <li>• Technical and management capacity and skills of consultant and other team members</li> <li>• Quality of consultant work based on recent and relevant project experience on similar assignments, demonstrating suitability to undertake work</li> <li>• Minimum 3 references relating to project</li> </ul>
Methodology	25	<ul style="list-style-type: none"> <li>• Understanding of project requirements, scope of work and deliverables</li> <li>• Detailed methodology in addressing scope of work and deliverables</li> <li>• Knowledge or experience in the B.C. Local Government Management Association's file classification management system or similar system</li> <li>• Details of team member participation and role in delivering work</li> </ul>
Work Schedule	20	<ul style="list-style-type: none"> <li>• Format, clarity and quality of proposed work plan and schedule detailed by major part and each key task</li> <li>• Realistic timeline and ability to meet deadlines</li> </ul>
Fees	20	<ul style="list-style-type: none"> <li>• Costing of each major part and key task to complete the Project</li> </ul>

**Maximum Total Score = 100**

## **2.7 Acceptance and Rejections of Proposals**

The CVRD may not necessarily accept the lowest priced proposal or any proposal. At its sole discretion, the regional district reserves the right to reject any or all proposals received and to accept any proposal which it considers advantageous. The CVRD is not under any obligation to award a contract, and reserves the right to terminate the RFP process at any time, and to withdraw from discussions with any or all of the vendors who have responded. The CVRD shall not be obligated in any manner to any vendor whatsoever until a written agreement has been duly executed relating to an approved proposal. Proposals must meet all the requirements herein to be eligible for consideration. Proposals that are unsigned, incomplete, conditional, illegible, unbalanced, obscure or that contain additions not called for, reservations, erasures, alteration, or irregularities of any kind may be rejected. The CVRD reserves the right to obtain additional information from the vendors to clarify the information in their submission.

## **2.8 Confidentiality and Security**

The successful vendor shall agree not to divulge or release any information that has been given to it or acquired by it on a confidential basis during the course of carrying out its duties or performing its services. It is the CVRD's policy to maintain confidentiality with respect to all confidential information related to the Requests for Proposals, but the CVRD is subject to the Freedom of Information and Privacy Act.