



Request For Proposal

TITLE: Digital Data Disaster Recovery and Electronic Records Backup Project

ISSUE DATE: January 3, 2018

PURPOSE OF THE REQUEST FOR PROPOSAL (RFP): The Kootenay Boundary Community Services Co-operative (KBCSC) is seeking qualified consulting services to provide digital disaster recovery advisory services, policy and procedure work, and service implementation and training to support the KBCSC’s efforts in strengthening the operational capacity of its Members.

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1. Introduction

The Kootenay Boundary Community Services Co-operative (KBCSC) is composed of non-profit social service-providing agencies in the Kootenay Boundary Region (see list of members in Appendix A). The purpose of the KBCSC is to pursue, deliver, and co-ordinate resources and services provided by and for its members. The Kootenay Boundary Community Services Co-operative:

- helps maintain and support member organisations in the face of challenges such as limited funding and geographic distribution and isolation;
- provides for the members a regional community-based forum for planning, pursuing, and distributing community, social, and health service resources within the context of larger and more inclusive regional forums;
- offers a range of alternatives for providing community, social, and health services, based on what is deemed most appropriate and effective for service recipients;
- serves as a platform for the development of organisationally efficient and effective practices in areas of interest to some or all members;
- strengthens the ability of the member organisations to offer high quality, cost-effective community, social, and health services to the residents of our region, especially those who are not well-served by conventional government services and/or private, for-profit enterprises.

KBCSC member organisations (see Appendix A) work together in partnership to plan and deliver services regional in nature, to develop new ideas through projects, and to support each other. It is through the co-operative model that the members are able to enhance and improve the quality of services they provide to their individual communities and service constituents. For more detailed organisational information, please refer to the KBCSC website: <http://thekoop.ca/>

1.1. Partnership Background

The Kootenay Boundary Community Services Co-operative (KBCSC) and the Columbia Basin Trust (Trust) have a mutual goal of strengthening the capacity of non-profit social service organisations in the Basin, and particularly the fifteen member agencies of KBCSC. To address this goal, a partnership has been established with a core objective of developing and implementing services and supports to strengthen the capacities of member agencies. This includes the following:

- Address common operational challenges faced by members;
- Assist members in strengthening their organisations' foundations;
- Assist members in their commitment to develop and maintain high quality services; and
- Explore and pursue opportunities for members to achieve financial and/or operational benefits.

In the September "IT Shared Service Review" report (MYRA, 2017), it was identified that across member organisations, there is a low maturity in the approach to digital data disaster recovery and electronic records backups. This low maturity is entirely attributable to the cost of on premise infrastructure and software; and/or a gap in understanding the organisational importance of data backups (and archives). A key priority tied to this objective is the need and desire to assist members with shared solutions/services to address information technology needs in the areas of file storage and document management and disaster recovery.

1.2. Project Goals

Our broad goals for the project include:

- Improve member organisations' ability to reduce the associated risk from, and restore day to day operations in a reasonable time following, unplanned incidents or events.
- Support member organisations' data retention needs for regulatory, and intrinsic long term strategic business value.
- Develop members' in-house expertise of best practices for digital disaster recovery and electronic records backups.

2. Instructions for Proposal Delivery:

2.1. Closing Time:

The Proposal must be received on or before the following date and time:

Date: January 22, 2018

Time: 4:00 PM PT / 5:00 PM MT

2.2. Closing Location:

The Proposal must be received at the following email address: info@thekoop.ca

Faxed Proposals will not be accepted.

When a Proponent elects to submit their Proposal by email then:

- a) The email containing the Proposal will be deemed to have been received at the Closing Location at the date/time stamped/tagged by KBCSC's email system; and
- b) The Proponent assumes the entire risk that the email is received by the addressee and is complete, including the risk that the KBCSC's system will not properly receive the email and any email attachments before the Closing Time. The KBCSC's inability to receive an email or email attachment, for any reason, shall not constitute an exception to the mandatory requirement to submit Proposal by the Closing Time, and the KBCSC assumes no risk or responsibility that any email will be received.

3. The KBCSC's Contact Person

All enquiries related to this RFP, including any requests for information and clarification, should be directed, in writing, to the following person by 1:00 PM PT / 2:00 PM MT January 16, 2018. Information obtained from any other source is not official and may not be relied upon. Enquiries and any responses will be recorded and may be posted to the KBCSC's website: www.thekoop.ca at the KBCSC's option. No oral conversation will affect or modify the terms of this RFP or may be relied upon by any Proponent.

Name: Janice Murphy

Email: info@thekoop.ca

Proponents finding discrepancies or omissions in this RFP, or having doubts as to the meaning or intent of any provision, should promptly notify the KBCSC's Contact Person. If the KBCSC determines that an amendment is

required to this RFP, the KBCSC's Contact Person will issue an addendum on the KBCSC's website at www.thekoop.ca.

4. RFP Terms

4.1. Additional Information

The Selection Committee may, at its discretion request clarifications or additional information from one or more selected Proponents with respect to any Proposal. The Selection Committee may, at its discretion, invite one or more of the Proponents to appear before the Selection Committee to clarify their Proposals. In the above events, the Selection Committee will be entitled to consider such clarifications, additional information or answers received in evaluating Proposals.

4.2. Terms and Conditions

This RFP is not an agreement to purchase goods or services. The KBCSC is not bound to select a preferred Proponent, or any Proponent; or to enter into an agreement with the Proponent who submits the lowest-priced Proposal. A Proposal submission indicates acceptance of all requirements and terms stated in this RFP; as well as that the Proponent has carefully read and examined the RFP in its entirety. The Proponent agrees to be bound by the statements and representations made in its Proposal. The KBCSC reserves the complete right to reject all Proposals and terminate this RFP at any time.

4.3. Late Proposals

It is the sole responsibility of the Proponent to ensure its Proposal is received at the Closing Location before the Closing Time. Late Proposals will not be accepted. In the event of a dispute, the receipt time, as recorded at the Closing Location or email system shall prevail.

4.4. Completeness of Proposal

By submitting a Proposal, the Proponent represents that, if this RFP is for Proposals to design, create or implement a system, all components required to run the system have been identified in the Proponent's Proposal or will be provided by the Successful Proponent as part of the proposed cost or fee and at no further charge to the KBCSC.

4.5. Proponents' Expenses and No Claims

Proponents are solely responsible for their own expenses in preparing and submitting Proposals and for any meetings, negotiations or discussions with the KBCSC or its representatives and consultants, relating to or arising from this RFP.

By submitting a Proposal, each Proponent:

- a) agrees that the KBCSC and its members, representatives, consultants and advisors will not under any circumstance be liable for any claims, whether for costs, expenses, losses (including loss of anticipated profits), damages or liabilities that are or maybe incurred or suffered by any Proponent arising from or in any way connected to this RFP and
- b) waives any and all claims against the KBCSC or any of its members, advisors, representatives, consultants or advisors.

4.6. Liability for Errors

While the KBCSC has attempted to ensure the information in this RFP is accurate, the information contained in this RFP is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the KBCSC, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP and the KBCSC accepts no responsibility for any errors or omissions in the information contained in this RFP.

5. RFP Response Guidance

Please include the following information in your response:

- General overview of your organisation including history, location, staffing levels, staffing practices (e.g. in-house team, contractors, others), project management practices, and quality assurance practices.
- Discussion of your relevant experience with a focus on projects of a similar size and nature to digital data recovery and electronic records backups for the non-profit community social service sector.
- Three references from past clients.
- Proposed methodology and timelines for completing the Deliverables with an expected project start date of January 29, 2018.
- Your pricing proposal. The pricing proposal should include any taxes, travel, licensing or other costs.

6. Project Requirements

#	Requirement	Priority
1	Identify digital data storage and recovery best practices for non-profit community social service organisations and develop standardized digital storage, backup retention, and recovery policies and procedures.	Mandatory
2	Assess and make recommendations regarding network requirements (minimum workable internet bandwidth requirements), technical hardware and software requirements of members for the adoption of shared or common digital storage service practices (including but not limited to cloud-based storage – i.e., sync.com, the MYRA report recommends sync.com as the service members setup accounts with and utilize).	Mandatory
3	Assist six individual members of KBCSC (see Appendix B) with implementation and set up of digital storage services and electronic record backup procedures (i.e., sync.com). Participating Members' solutions may need to be scaled initially according to the individual members' IT context (e.g., available bandwidth).	Mandatory

#	Requirement	Priority
4	Provide training to members on implementation of standardized digital data storage and recovery policies and procedures and support adoption of procedures to fit the individual service needs of each organisation.	Mandatory
5	The KBCSC will retain ownership of any policies and procedures and training plans developed.	Mandatory

6.1. Process Deliverables

The successful proponent will initially be required to:

- Meet with the KBCSC Executive Director to gain understanding of the KBCSC, including our history, mandate, and our goals for the project.
- Review all relevant research provided by the KBCSC and meet with the six participating member organisations' representatives (see Appendix B), to gain an understanding of our member organisations and their needs.
- Develop and seek approval from the Executive Director, for their overall approach to the project, including clear definitions of roles and responsibilities, time commitments, timelines, deliverables and all other related project matters.
- Share your progress and work samples with the Executive Director on an agreed reporting schedule via email and phone.

The successful proponent will be required to complete the following within the project scope:

- Design, develop and implement the digital data recovery and electronic backup systems for six (6) member organisations, meeting all requirements.
- Develop and deliver a training plan and best practice policy and procedure support documentation for the six (6) organisations (see Appendix B).

6.2. Content Deliverables

The successful proponent will deliver the following as part of this project:

- Best practice policies and procedures for non-profit community social service organisations' digital data storage and electronic back
- Set-up and implementation of digital data storage and recovery and electronic records back-up systems in the six participating member organisations (see Appendix B).
- Training and documentation.

7. Desirable Criteria

The Evaluation Committee will evaluate Proposals meeting all of the mandatory criteria against the following desirable criteria to determine the Proposal(s) that is(are) most advantageous to the KBCSC Members.

Criteria:

- a) Demonstrated understanding of the services being sought under the RFP.
- b) Proposed methodology for providing the services.
- c) Qualifications and experience for all parties involved.
- d) Fees and expenses.

The Evaluation Committee may apply the criteria on a comparative basis, evaluating the Proposals by comparing one Proponent's Proposal to another Proponent's Proposal

8. Schedule

The project must be completed within a 12-week schedule, as outlined below:

- RFP Issued: January 3, 2018
- Response Due: January 22, 2018
- Start Date: February 5, 2018
- End Date: April 30, 2018

9. Budget

The Partnership has approved a \$15,000 – \$18,000 budget range for the digital data disaster recovery and electronic records backup project.

Appendix A: KBCSC Members

<p>Arrow & Slocan Lakes Community Services Society Box 100, 205 – 6th Ave. NW Nakusp, BC V0G 1R0; 250-265-3674</p>
<p>Boundary Family & Individual Services Society Box 2498, 1200 Central Ave., Grand Forks, B. C. V0H 1H0; 250-442-2267</p>
<p>Castlegar & District Community Services Society 1007 – 2nd Street, Castlegar, BC V1N 1Y4; 250-365-2104</p>
<p>Circle of Indigenous Nations Society (COINS) 1005 2nd Street, Castlegar, B.C. V1N 1Y4; 250-231-4968</p>
<p>Columbia Basin Family Resource Society 1592 10 Ave, PO Box 2054, Fernie, BC V0B 1M0; Phone:(250) 423-4687</p>
<p>Freedom Quest Youth Services Society 349 Columbia Avenue, Castlegar, BC V1N 1G6; Phone: 250-304-2676</p>
<p>Kootenay Family Place Box 3144, 767 11th Avenue, Castlegar, BC V1N 3H4; 250-365-8448</p>
<p>Kootenay Kids Society 312 Silica Street, Nelson, BC V1L 4M5; 250-352-6678</p>
<p>Kutenai Art Therapy Institute 191 Baker Street, Nelson, BC V1L 4H1; 250-352-2264</p>
<p>Nelson CARES Society 521 Vernon Street, Nelson, BC V1L 4E9; 250-352-6011</p>
<p>Nelson Community Services #201 – 518 Lake Street Nelson BC, V1L 4C6; 250-352-3504</p>
<p>North Kootenay Lake Community Services Society 336 "B" Avenue, Box 546, Kaslo, BC, V0G 1M0; 250-353-7691</p>
<p>Salmo Community Resource Society PO Box 39, 311 Railway Avenue, Salmo BC V0G 1Z0; 250-357-2277</p>
<p>Trail FAIR Society 2079 Columbia Ave, Trail, BC V1R 1K7; (250) 364-2326</p>
<p>West Kootenay Women's Association & Nelson Women's Centre 420 Mill Street, Nelson, BC V1L 4R9; (250) 352-9949</p>
<p>Kootenay Boundary Community Services Co-operative 125 Hall Street, Nelson, BC V1L 7B4; (250) 352-6786</p>

Appendix B: KBCSC Members participating in the Digital Data Recovery & Electronic Records Back-up Project

Member Organisations	# of computers owned	Data storage on cloud	Data storage on local server
Columbia Basin Family Resource Society 1592 10 Ave, PO Box 2054, Fernie, BC V0B 1M0 Phone:(250) 423-4687	8 (5 desktops; 3 laptops)	no	TBC
Freedom Quest 349 Columbia Avenue, Castlegar, BC V1N 1G6 Phone: 250-304-2676	15	Microsoft online	no
Kutenai Art Therapy Institute 191 Baker Street, Nelson, BC V1L 4H1; 250-352-2264	7	Dropbox	External HD
North Kootenay Lake Community Services 336 "B" Avenue, Box 546, Kaslo, BC, V0G 1M0; 250-353-7691	17 (8 desktop; 7 laptop; 2 servers)	some limited use of Sync.com & Dropbox	2 servers: Linux Ubuntu
Salmo Community Resource Society PO Box 39, 311 Railway Avenue, Salmo BC V0G 1Z0; 250-357-2277	8 Mac computers	no	"H" drive
Trail FAIR Society 2079 Columbia Ave, Trail, BC V1R 1K7; (250) 364-2326	35 computers	no	Network server