REGIONAL DISTRICT OF NANAIMO

REQUEST FOR STATEMENTS OF QUALIFICATIONS

The Regional District of Nanaimo (RDN) invites qualified and experienced independent contractors or consulting firms to submit a statement of qualifications to assist the RDN with developing a work plan identifying phases, costs, skills, resources, and timing required to prepare and implement an Electronic Document and Records Management System (EDRMS).

## A.	Intent

This Request for Statements of Qualifications (RFSQ) is issued to determine the most qualified service provider that can meet the RDN's requirements, expectations and timeline.

The RDN will review submissions received in response to this RFSQ and intends to enter into discussions with the top-ranked Respondent to clarify information, if necessary, and to negotiate the terms, scope, timeline and cost based on the actual scope of work required. Should these negotiations fail to result in a contract for the Work, the RDN may then elect to negotiate with another service provider.

In any event, the RDN shall not be bound to enter into a contract with any Respondent to this RFSQ and, at its sole discretion, may elect to collapse this process, negotiate with a service provider who did not respond to this RFSQ, negotiate with another Respondent regardless of ranking, or to pursue another selection process altogether.

## B.	Background & Current Situation

The RDN currently uses the following enterprise software:

Financials – Vadim

Property – CityView

Document Management – SharePoint (partial functionality)

eSCRIBE – Meeting Management

Active Net – Recreation Registration

## C.	Contemplated Scope of Work

The objective of this project is to conduct a needs/readiness assessment and prepare a project plan for the preparation and implementation of an EDRMS system, including identification of the required budget and operational resources. Deliverables may be used to prepare annual

budget requests and a future Request for Qualifications and Request for Proposals for an EDRMS system.

The anticipated start date of the needs/readiness assessment is June 2018 and is to be completed on or before September 30, 2018.

The scope of work may include, but is not limited to:

1. Performing a needs/readiness assessment to identify:

    a) Financial requirements such as cost estimates and budgets required with an emphasis on lifecycle costs needed for EDRMS preparation, implementation, and post implementation.

    b) Human resource requirements needed for EDRMS preparation, implementation and post implementation.

    c) Deficiencies and/or gaps in the organization to implement an EDRMS and to propose remediation strategies based on best practices including costs.

    d) Risks and mitigation strategies.

    e) A project schedule/timeline to assist the RDN with EDRMS software selection (part 2 below) based on the needs/readiness assessment.

    f) Review existing policies and procedures and provide recommendations based on best practices.

    g) The appropriate systems and records for inclusion in this EDRMS project.

    h) A plan with timeline for creating a records classification and retention schedule and any other underlying systems that need to be in place before EDRMS implementation.

2. Assist the RDN with EDRMS software selection. The RDN will most likely follow a Request for Qualifications process to create a shortlist of software providers and then issue a Request for Proposals to the shortlisted firms.

    a) Develop high-level and detailed specifications, based on the needs readiness assessment to be included in any RFQ/RFP.

    b) Evaluate and test software identifying pros and cons of each and make recommendations.

    c) Interview vendors and/or clients.

    d) Provide lifecycle software cost analysis.

    e) Assist with the development of evaluation and software testing criteria.

    f) Assist with evaluating responses and any subsequent contract negotiations.

D. **Statement of Qualifications**

The statement of qualifications should be no longer than twenty (20) pages in length (including cover page, cover letter and appendices), and should be submitted electronically in pdf format to: mrmoody@rdn.bc.ca

Please include the following:

- Relevant qualifications and experience of the Company and its areas of expertise.

- Résumés/CVs of key proposed project personnel.

- 3 project abstracts including short descriptions of similar projects and assignments recently completed by the key personnel, providing references and contacts for each.

- A statement of your firm's ability to complete the work within the timeframe described.

Statements of Qualifications (the "SOQ") will be evaluated by the RDN. Any or all SOQs will not necessarily be accepted. Evaluation criteria and relevant weightings are:

- Experience and capability of firm and key assigned staff in similar assignments – 40%.
- Past performance of firm and key assigned staff as determined by abstracts – 40%.
- Availability of key assigned staff and ability to meet the RDN's timeline – 20%.

E. **Deadline for Submission**

Please submit statements of qualifications **by no later than 2:00:00 p.m. local time on the 18th day of May, 2018.**

F. **Inquiries**

Submissions and queries shall be directed to:

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