First Nations Public Service Secretariat Information Management Toolkit RFP

Request for Proposals for the Information Management Toolkit to manage a compliance audit, revisions and substantive update to the Information Management Toolkit for First Nations Governments in BC: https://fnps.ca/resources/#infomgmttoolkit

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1. About First Nations Public Service Secretariat

Purpose To create and implement a collective plan to support First Nations communities in BC as they pursue excellence in capacity building and human resource development.

Vision BC First Nations are exercising their decision-making rights and responsibilities through governments and administrations that strive for excellence in community service.

Mission The First Nations Public Service Secretariat's (FNPSS) mission is to strengthen and enhance capacity in First Nations communities and organizations on an individual and nation level.

Goals

1. Strengthen and support relationships between First Nations Leadership, administration and communities;
2. Coordinate and strengthen human resource development for Nations workers in the core competencies: human, financial, records and information management, and policy development;
3. Support and enhance human resource development efforts for Nation workers in a range of professional sectors such as health, education, children and families, resource management.

FNPSS delivers numerous Management Training Academies (MTA) across BC, including an MTA for Records and Information Management (RIM) .

The RIM MTA aims to provide action-focused training that will help participants return to their organizations with strategies for managing their information. During the two-day workshop, participants engage in "hands on" reviews of information capture and control, filing systems, electronic records, security issues and control systems. Additionally, participants work together to develop a strategy, plan and budget guidelines for the establishment and operation of a records and information management program in their respective organizations.

All participants also receive a copy of the FNPSS First Nations Information Management Toolkit. These Toolkits include invaluable information and implementation strategies to help facilitate the incorporation of the skills learned at the MTA.

In 2010, ARMA Canada Region, ARMA Vancouver Chapter, the First Nations Summit Society and the First Nations Public Service Secretariat signed an MoU to support British Columbia First Nations in records and information management capapcity. In 2019, the MoU was renewed and expanded the support with respect to Records and information management objectives for BC First Nations.

2. Summary and Background

The First Nations Public Service Secretariat (FNPSS) is currently accepting proposals to conduct a compliance audit, revision, and substantive update of the Information Management Toolkit for First Nations Governments in BC (the Toolkit).

The purpose of this Request for Proposal (RFP) is to identify candidates who can lead the re-development of the Toolkit as a cornerstone of FNPSS' efforts to support and enhance information management for Indigenous governments.

The Toolkit was first developed in 2010 along with targeted training 'bootcamps' to facilitate the adoption of its principles and to train frontline RIM workers and foster their professional development. The toolkit has undergone minimal revision since its initial publication 2010. In 2015 the First Nations Summit assumed custody of the Toolkit. At

that time the original source documents were missing, and the Toolkit was therefore recreated from the PDF file into an editable Word version with revisions to its format, layout and methods of delivery.

The Toolkit has been offered freely as a guide for compliant Records and Information Management since its initial publication. It has been adopted throughout BC and elsewhere in Canada, including, various BC and Canada First Nations.

3. Proposal Guidelines

This RFP outlines the proposal requirements and process by which they will be evaluated in support of an open and competitive process. Proposals will be accepted until 4:30 pm PDT, July 26, 2021. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by the candidate(s) submitting the proposal.

If the candidate(s) submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive and include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the organization(s) being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning candidate for the RFP. All contractual terms and conditions will be subject to review by FNPSS legal counsel and will include scope, budget, schedule, and other necessary items pertaining to the project.

4. Project Overview

The Toolkit was first developed in 2010 and has undergone minimal revision since then. The current toolkit's content, format, and RIM documentation are now out of date since it was developed more than ten years ago. The purpose of this project is to conduct comprehensive review, update and compliance audit of the toolkit, both to ensure currency and accuracy of content, and to incorporate more forward-thinking, Indigenous-centred theories and practices around information management. The goal is to provide FNPSS clients with an information management framework that will meet all current regulatory requirements and industry best practices; is relevant to the realities and operations of First Nations administrations; supports First Nations to assert OCAP® principles in their records and information management systems and recognizes First Nations rights and soverienty over data and information, traditional knowledge, and establishment of governance structures and systems; aligns with the Articles of the United Nations Declaration on the Rights of Indigenous Peoples, the Calls to Action of the Truth and Reconciliation Commission, and other key documents; and, supports culturally-relevant ways of organizing and managing information assets in a First Nations context.

The successful candidate will lead engagement sessions with appropriate groups to seek feedback and advice on the toolkit; build the toolkit and RIM documentation that cover emerging technologies and align with all aspects referenced above and other legislation as appropriate; and enhance accessibility and usability of the Toolkit by recommending a variety of options for layout and access, including hardcopy and digital formats.

5.1 Project Scope:

The scope of this project includes all development activities, writing and tool development, compliance audit, legal citations, retention policies, and delivery/format options. Existing Toolkit source documents are available online: https://fnps.ca/resources/#infomgmttoolkit

Deliverables include the following:

- Project plan and methodology;

- Schedule of engagement with users, including First Nation users, MTA students and trainers, and Information Governance Advisory Committee (IGAC) members to inform the revision process;

- Feedback report;

- Outline for revised toolkit;

- Recommendations for user-friendly access options in consideration of connectivity limitations of many First Nations; ease of maintenance of all deliverables by FNPSS staff over time; and, searchability of content;

- Draft(s) of toolkit and required revisions in a Word document with any graphics (including rights to graphics);

- Practical RIM documentation for each toolkit section, including RIM policies and procedures and sample(s) of records classification and retention schedule (including rights to those sections);

- Toolkit that covers electronic records and information; emerging RIM systems and technologies;

- Toolkit that recognizes and incorporates emerging theories and practices respecting Indigenous ways of knowing / Indigenous Knowledge, and provides examples of how this can be incorporated into a RIM program;

- Toolkit that incorporates and recognizes implications of United Nations Declaration on the Rights of Indigenous People (UNDRIP), British Columbia Declaration on the Rights of Indigenous Peoples Act (DRIPA), Ownership, Control, Access and Procession (OCAP®), and First Nations Data sovereignty;

- Toolkit that has two volumes; the first volume contains RIM guidance for First Nations governments and the second volume focuses on daily RIM procedures and routines;

- User-testing to ensure stated requirements have been met;

- Where possible, tracking of Toolkit adoption for future engagement/revision;

- Final version of toolkit (in Word).

5.2 Aniticpated Project Timeline:

Event	Anticipated Date
Planning, engagement and feedback sessions	Throughout September and October 2021
Report draft and revisions	November to February 2021
Completion and submission of all deliverables	March 31, 2022

Note: FNPSS anticipates completing the project by the end of fiscal year; however, the project timeline is negotialble based on the deliverables.

6. Request for Proposal Timeline

RFP deadline is **4:30 pm PST, July 26, 2021**. Proposals will be evaluated, and the final decision will be announced no later than the end of August, with Contract to be completed in time for Fall start date.

7. Details of Submission

7.1 Candidate Qualifications:

Candidates should have experience in the following areas:

- proven experience in working in or with BC First Nations to implement a RIM system;

- strong working knowledge of RIM principles and application;

- experience in providing RIM training and developing training materials;

- excellent project management, communication, and interpersonal skills;

- effective client-focused approach;

- ability to work cooperatively with a team.

7.2 Proposal Content:

Candidates should provide the following items as part of their proposal for consideration:

7.2.1 Candidate Profile

This section must include:

- A brief introduction of the candidate including educational and professional qualifications;

- Identification and brief description of experience and relevant qualifications;

- Contact information for any questions or clarifications arising from proposals. Contact information should include name, title, address, email, and phone number;

- Details of any subcontracting arrangements proposed by the candidate.

7.2.3 Relevant Experience and References

This section must include:

- Specifically highlighting recent and relevant project experience that demonstrates the candidate's skills and suitability to undertake the scope of work.

- A list of client references or testimonials (a minimum of two) relating to relevant project experience, are required, including the name, address and phone number of references.

7.2.4 Project Understanding and Proposed Methodology

This section must include:

- Candidate's understanding of the Information Toolkit project and FNPSS' needs

- Detailed proposed methodology, taking into account all requirements of this RFP. Candidate should outline their project vision, processes and systems used for planning, scheduling, and budgeting to meet the project scope.

- Identification of any potential options, or changes to the outlined approach, that could be advantageous to FNPSS. Any such changes and optional work should be identified specifically.

7.2.5 Work Schedule and Cost

This section must include:

- Proposed costs to complete the task described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly recurring costs (MRC) as necessary.

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

Pricing should be listed for each of the following items in accordance with the format below:

Project initiation and planning	(NRC)	(MRC)
Engagements and feedback	(NRC)	(MRC)
Outsourcing/sub-contracting for any work	(NRC)	(MRC)
Delivery/format options	(NRC)	(MRC)

Note: Bids over $80,000 CAD will not be considered; candidates should note that evaluation criteria includes consideration of best value for money.

8. Proposal Evaluation Criteria

FNPSS will evaluate all proposals based on the following criteria by the RFP Review Board (the Board). If additional information or discussion are needed with any candidates during the evaluation period, the Board will notify the candidate(s) or conduct an interview. To ensure consideration for this RFP, your proposal must be complete. Evaluation will consider the following criteria:

Evaluation Category	Weighting	Details
Profile	20	Candidates will be evaluated on: • Overall educational and professional qualifications, including sub-contractors.
Previous Experience and References	20	Candidates will be evaluated on: • Their RIM expertise and experience; • Their skills (e.g., project management, communication, interpersonal, and client-focused approaches) as it pertains to the scope of this project; • Examples of their work pertaining to the scope of this project, including references and testimonials;

Project Understanding and Proposed Methodology	30	Candidates will be evaluated on: • Overall proposal suitability that proposed solution(s) meet the scope and needs included herein and be presented in a clear and organized manner.
Work Schedule and Cost	30	Candidates will be evaluated on: • The cost of their solution(s) based on the work to be performed in accordance with the scope of this project and its work schedule;
Total Points	**100**	

9. Rights of FNPSS

FNPSS reserves the right to

- Reject any or all proposals;
- Accept any proposal in whole or in part;
- Cancel and/or reissue any part of the RFP.

Each candidate must submit their proposal to FNPSS via email: info@fnps.ca, by **4:30 pm PST, July 26, 2021**.

10.   Contact Information

For questions or further information regarding this RFP and associated project, please contact info@fnps.ca.