



Request for Proposals

All enquiries related to this Request for Proposals, including any requests for information and clarification, are to be submitted by **March 18, 2022** and directed, in writing, to procurement@bcogc.ca, who will respond if time permits. Information obtained from any other source is not official and should not be relied upon. Enquiries and any responses will be recorded and may be distributed to all Proponents at the Commission's option.

RFP #25123001

Electronic File Structures (ARCS/ORCS) for Shared Network Folders

Closing Time: Proposal must be received electronically **before 2:00 PM** Pacific Time on: March 24, 2022

Delivery of Proposals

Proposals must be submitted electronically.

To: <https://procurement.bcogc.ca/>

Proponent's Meeting

A Proponent's meeting will not be held.

Organization Overview

The BC Oil and Gas Commission (Commission) is an independent, single-window regulatory agency with responsibilities for overseeing oil and gas operations in British Columbia. Regulatory responsibility is delegated to the Commission through the *Oil and Gas Activities Act* and includes specified enactments under the *Forest Act*, *Heritage Conservation Act*, *Land Act*, *Environmental Management Act*, and *Water Act*. The operating costs of the Commission are funded through industry fees and levies on a cost recovery basis.

The Commission's core roles include reviewing and assessing applications for industry activity, consulting with First Nations, ensuring industry complies with provincial legislation and cooperating with partner agencies. The public interest is protected by ensuring public safety, protecting the environment, conserving petroleum resources and ensuring equitable participation in production.

The regulatory responsibility of the Commission extends from the exploration and development phases of oil and gas activities through to facilities operation, and ultimately decommissioning of industry projects. It is charged with balancing a broad range of environmental, economic and social considerations.

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A. Definitions and Administrative Requirements

1. Definitions

Throughout this Request for Proposals, the following definitions apply:

- a) "Contract" means the written agreement resulting from this Request for Proposals executed by the Commission and the Contractor;
- b) "Contractor" means the successful Proponent to this Request for Proposals who enters into a written Contract with the Commission;
- c) "Must", or "mandatory" means a requirement that must be met in order for a proposal to receive consideration;
- d) "Proponent" means an individual or a company that submits, or intends to submit, a proposal in response to this Request for Proposals;
- e) "Commission" means the Oil and Gas Commission;
- f) "Request for Proposals" means the process described in this document; and
- g) "Should" or "desirable" means a requirement having a significant degree of importance to the objectives of the Request for Proposals.

2. Terms and Conditions

Submitting a proposal indicates acceptance of all the terms and conditions set out in the RFP, including those that follow and that are included in all appendices and any Addenda.

A proposal must be signed by a person authorized to sign on behalf of the Proponent with the intent to bind the Proponent to the RFP and to the statements and representations in the Proponent's proposal. A scanned copy of the signed cover page of this RFP is acceptable as is a cover letter identifying the Proponent, identifying the RFP and including a signature of an authorized representative of the Proponent that confirms the Proponent's intent to be bound. For proposals submitted to an electronic proposal constitutes the signature of an authorized representative of the Proponent and is acceptable without additional signature.

3. Electronic Submissions

For electronic submissions the following applies:

- a) The Proponent is solely responsible for ensuring that the complete electronic Proposal, is received before Closing Time;
- b) The maximum size of each attachment must be 500 MB or less and uploaded in a single attachment;
- c) Proponents should submit proposal submissions in a single upload and avoid sending multiple submissions for the same opportunity;
- d) Attachments must not be compressed, must not contain a virus or malware, must not be corrupted and must be able to be opened. Proponents submitting by electronic submission are solely responsible for ensuring that any emails or attachments are not corrupted. The Commission may reject proposals that are compressed, cannot be opened or that contain viruses or malware or corrupted attachments.

4. Additional Information Regarding the Request for Proposals

All subsequent information regarding this Request for Proposals, including changes made to this document will be posted on the BC Bid website at www.bcbid.ca. It is the sole responsibility of the Proponent to check for amendments on the BC Bid website.

5. Late Proposals

Proposals will be marked with their receipt time once submitted. Only complete proposals received and marked before closing time will be considered to have been received on time. Proposals that are received late will be marked late and will not be considered or evaluated. In the event of a dispute, the proposal receipt time as recorded by the electronic date stamp shall prevail whether accurate or not.

6. Eligibility

- a) Proposals will not be evaluated if the Proponent's current or past corporate or other interests may, in the Commission's opinion, give rise to a conflict of interest in connection with the project described in this Request for Proposals. This includes, but is not limited to, involvement by a Proponent in the preparation of this Request for Proposals. If a Proponent is in doubt as to whether there might be a conflict of interest, the Proponent should consult with the Commission Contract Management Analyst prior to submitting a proposal.
- b) Proposals from not-for-profit agencies will be evaluated against the same criteria as those received from any other Proponents.

7. Evaluation

Evaluation of proposals will be by a committee formed by the Commission and may include employees and contractors of the Commission. All personnel will be bound by the same standards of confidentiality. The Commission's intent is to enter into a Contract with the Proponent who has the highest overall ranking.

8. Negotiation Delay

If a written Contract cannot be negotiated within thirty days of notification of the successful Proponent, the Commission may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the Request for Proposals process and not enter into a Contract with any of the Proponents.

9. Debriefing

At the conclusion of the Request for Proposals process, all Proponents will be notified of the award by BCBid. Unsuccessful Proponents may request a debriefing meeting with the Commission.

10. Alternative Solutions

If alternative solutions are offered, please submit the information in the same format, as a separate proposal.

11. Changes to Proposals

By submission of a clear and detailed written notification, the Proponent may amend or withdraw its proposal prior to the closing date and time. Upon closing time, all proposals become irrevocable. The Proponent will not change the wording of its proposal after closing and no words or comments will be added to the proposal unless requested by the Commission for purposes of clarification.

12. Proponents' Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with the Commission, if any. If the Commission elects to reject all proposals, the Commission will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

13. Limitation of Damages

Further to the preceding paragraph, the Proponent, by submitting a proposal, agrees that it will not claim damages, for whatever reason, relating to the Contract or in respect of the competitive process, in excess of an amount equivalent to the reasonable costs incurred by the Proponent in preparing its proposal and the Proponent, by submitting a proposal, waives any claim for loss of profits if no Contract is made with the Proponent.

14. Proposal Validity

Proposals will be open for acceptance for at least 90 days after the closing date.

15. Firm Pricing

Prices will be firm for the entire Contract period unless this Request for Proposals specifically states otherwise.

16. Currency and Taxes

Prices quoted are to be:

- a) In Canadian dollars;
- b) Inclusive of duty, where applicable; FOB destination, delivery charges included where applicable; and
- c) Exclusive of taxes

17. Completeness of Proposal

By submission of a proposal the Proponent warrants that, if this Request for Proposals is to design, create or provide a system or manage a program, all components required to operate the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

18. Subcontracting

- a) Using a subcontractor (who should be clearly identified in the proposal) is acceptable. This includes a joint submission by two Proponents having no formal corporate links. However, in this case, one of these Proponents must be prepared to take overall responsibility for successful performance of the Contract and this should be clearly defined in the proposal.
- b) Subcontracting to any firm or individual whose current or past corporate or other interests may, in the Commission's judgment, give rise to a conflict of interest in connection with the project or program described in this Request for Proposals will not be tolerated. This includes, but is not limited to, any firm or individual involved in the formulation of this Request for Proposals. If a Proponent is in doubt as to whether a proposed subcontractor gives rise to a conflict of interest, the Proponent should consult with the Commission Contact Person listed on page 1 prior to submitting a proposal.
- c) Where applicable, the names of approved sub-contractors listed in the proposal will be included in the Contract. No additional subcontractors will be added, nor other changes made, to this list in the Contract without the written consent of the Commission.

19. Acceptance of Proposals

- a) This Request for Proposals should not be construed as an agreement to purchase goods or services. The Commission is not bound to enter into a Contract with the Proponent who submits the lowest priced proposal or with any Proponent. Proposals will be assessed in light of the evaluation criteria. The Commission will be under no obligation to receive further information, whether written or oral, from any Proponent.
- b) Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any federal, provincial, regional district or municipal statute, regulation or by-law.

20. Definition of Contract

Notice in writing to a Proponent that it has been identified as the successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the goods or services, and no Proponent will acquire any legal or equitable rights or privileges relative to the goods or services until the occurrence of both such events.

21. Contract

By submission of a proposal, the Proponent agrees that should its proposal be successful, the Proponent will enter into a Contract with the Commission in accordance with the terms of the [Commission's General Service Agreement](#).

22. Liability for Errors

While the Commission has used considerable efforts to ensure the information in this Request for Proposals is accurate, the information contained in this Request for Proposals is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Commission, nor is it necessarily comprehensive or exhaustive. Nothing in this Request for Proposals is intended to relieve Proponents from forming their own opinions and conclusions with respect to the matters addressed in this Request for Proposals.

23. Modification of Terms

The Commission reserves the right to modify the terms of this Request for Proposals at any time in its sole discretion. This includes the right to cancel this Request for Proposals at any time prior to entering into a Contract with the successful Proponent.

24. Ownership of Proposals

All proposals submitted to the Commission become the property of the Commission. They will be received and held in confidence by the Commission, subject to the provisions of the *Freedom of Information and Protection of Privacy Act* and this Request for Proposals.

25. Use of Request for Proposals

Any part of this document, or any information provided by the Commission in relation to this Request for Proposals may not be used or disclosed, for any purpose other than for the submission of proposals. Without limiting the generality of the foregoing, by submission of a proposal, the Proponent agrees to hold in confidence all information provided by the Commission in relation to this Request for Proposals.

26. Reciprocity

The Commission may consider and evaluate any proposals from other jurisdictions on the same basis that the Commission purchasing authorities in those jurisdictions would treat a similar proposal from a British Columbia supplier.

27. No Lobbying

Proponents must not attempt to convey directly or indirectly with any employee, contractor or representative of the Commission, including the evaluation committee and any elected officials of the Commission, or with members of the public or the media, about the project described in this Request for Proposals or otherwise in respect of the Request for Proposals, other than as expressly directed or permitted by the Commission.

B. Requirements and Responses

1. Summary of the Requirement

The BC Oil and Gas Commission (Commission) requires a Records & Information Management (RIM) expert to organize a high volume of electronic records on a shared network drive. This organization is to be completed by developing new folder structures that conform to the requirements of the *Information Management Act* (IMA) through the implementation of the BC government's Administrative Records Classification Schedule (ARCS) framework and Commission's Operational Records Classification System (ORCS). The objective is to attain a state of Electronic Document & Records Management System (EDRMS) readiness, where the Commission's electronic records are appropriately classified in accordance with ARCS/ORCS and identified by standardized naming conventions at the folder level in preparation for future migration. The work is to be performed across the Commission on a branch by branch (business unit) basis, although simultaneous management of two or more projects may be required to maximize time and productivity. Oversight and direction will be provided by the Commission's internal Records & Information Services Branch, including the order and prioritization of projects for completion.

2. Anticipated Schedule

The following table outlines the anticipated schedule for this RFP. All times identified in the table are in Pacific Time.

Event	Anticipated Date
Enquiries deadline	March 18, 2022
Request closing time	March 24, 2022 2:00 PM PT
Reference checks, as required	March 28-April 1, 2022
Preferred Proponent selected by	April 4, 2022
Commencement of work	April, 2022

3. Commission Situation/Overview

The Commission is the provincial regulatory agency for permitting and overseeing oil and gas activities, from exploration and development through to operations and ultimately decommissioning of oil and gas industry projects under British Columbia jurisdiction. The Commission's current legislated mandate, regulatory framework, core activities and organizational structure are described in the [2021/22 – 2023/24 Service Plan](#) available on the Commission's website at www.bcogc.ca.

3.1 Commission Responsibility

The purposes of the Commission, outlined in Section 4 of the Oil and Gas Activities Act, are briefly summarized as follows:

- (a) to regulate oil and gas activities in British Columbia in a manner that
 - (i) provides for the sound development of the oil and gas sector, by fostering a healthy environment, a sound economy and social well-being,
 - (ii) conserves petroleum and natural gas resources,
 - (iii) ensures safe and efficient practices, and
 - (iv) assists owners of petroleum and natural gas resources to participate equitably in the production of shared pools of petroleum and natural gas;
- (b) to provide for effective and efficient processes for the review of applications for permits and to ensure that applications that are approved are in the public interest having regard to environmental, economic and social effects;
- (c) to encourage the participation of First Nations and aboriginal peoples in processes affecting them;
- (d) to participate in planning processes;
- (e) to undertake programs of education and communication in order to advance safe and efficient practices and the other purposes of the commission.

3.2 Background

The Commission has modernized its Operational Records Classification System (ORCS) to reflect its current mandate, lines of business, and the records that support these. The amended records schedule (Schedule 163507, Amendment 144019) received approval by the provincial Chief Records Officer in March 2019.

Implementation of ARCS and ORCS within the Commission's unstructured electronic records environment has been identified as a critical initiative to support the organization's ongoing transition to Microsoft Office 365 (M365) and future planned migration of records from the shared drive to the new platform. The ARCS and ORCS implementation work has been initiated and completed in some branches, however, a significant number of business units have yet to be supported.

The Commission's goal is to complete implementation of ARCS and ORCS across all branches of the organization.

4. Requirements

4.1 Scope of Services

The services outlined in this Request for Proposals (RFP) are anticipated to commence April 2022 and complete on March 31, 2023 within a maximum contract amount of \$75,000.00. The Commission has discretion to offer the proponent a one-year renewal of services in fiscal 2022/23.

The successful Proponent will be expected to use Microsoft Teams to support regular engagement with the Commission's Records Management team and branch staff in the various Commission offices (Victoria, Fort St. John, Kelowna, Prince George, Dawson Creek, and Terrace). Travel will not be required. All meetings with staff will be conducted remotely and project work will be completed offsite using a Commission issued user ID and laptop. An exception to the offsite arrangement might apply if the successful Proponent is located in Victoria, BC and ad hoc in-person meetings are mutually agreed upon by all parties.

The successful Proponent will be expected to comply with the Commission's COVID-19 Vaccination Policy for External Visitors/Contractors as a condition of the contract. Information on the Commission's vaccination requirements is available [here](#).

The successful Proponent who enters into a written contract with the Commission will be responsible for the following services:

Establishment of folder structures and folder naming conventions:

- Developing accurate, standardized electronic folder structures based on Commission program records and business requirements, and applicable records schedules (ARCS/ORCS)
- Establishing and implementing standardized folder naming conventions
- Moving folders and associated records to the new folder structure (with user acceptance/permission)
- Identifying and removing transitory or duplicate records (clean-up), and other folders deemed necessary using Commission approved software (Tree Size)
- Identifying folders/files eligible for disposition
- Establishing a security matrix for the folders with established business rules related to configuration and necessary permissions

User support, training and change management:

- Effectively initiating each electronic filing project with program staff to ensure clear understanding of project scope and methodology, expectations of staff, and what support will be available
- Consulting with staff throughout the project to ensure their input results in a structure that is both intuitive and easy to follow
- Providing effective communications and guidance to ensure staff can locate records in a timely manner at any given point of the project (first point of contact)
- Educating staff to encourage transfer of any official records saved on personal drives to the new shared folder structure
- Developing user guidelines and procedures, finding/mapping aids, and delivering training (formal or desk-side) to staff on the use and maintenance of the new shared drive folder structure

Project reporting and monitoring:

- Providing briefings and status updates as and when requested
- Maintaining project progress and completion metrics to support statistical reporting and final results
- Maintaining a current work plan and project schedule

4.2 Content Requirements

To respond to this Request for Proposals, Proponents are required to submit the following information:

A. Proposed Approach

- 1) Provide a description of the methodology (approach) that will be followed to successfully develop electronic filing structures for Commission clients based on ARCS/ORCS
- 2) Describe how clients will be supported through the project as they transition from their old filing structure to the new structure
- 3) Describe how clients will be trained on using and maintaining the new filing structure once implemented (e.g. describe and/or include samples of any guidelines, training tools, aids, etc.)
- 4) Describe how project progress will be tracked and measured to ensure timeliness and quality of deliverables

B. Proposed Proponent, Qualifications and Hourly Rate

- 1) Provide the name of proposed individual to complete work (1 individual only)
- 2) Provide a brief description of your (or named individual) qualifications and abilities relevant to the services outlined
- 3) Provide hourly rate for services
- 4) Provide two satisfied client references, including name, title, organization, phone number, email address and date that you (or named individual) worked for these clients

C. Relevant Experience

Please provide answers to the following:

- 1) What work experience do you (or named individual) have with respect to implementing ARCS and/or ORCS schedules in a BC government setting? Include a brief description of the government organization(s), nature of work performed, when the work was completed, and in what capacity.
- 2) What experience do you (or named individual) have delivering electronic file structure projects? Include a brief description of a project(s) that included organizing electronic folders and/or documents on a shared drive and applying record schedules.
- 3) Was your (or named individual) project(s) specific to preparing electronic records for future migration to an Electronic Document & Records Management System (EDRMS) or Microsoft Office 365? Was your (or named individual) project(s) successfully completed? Include a brief description of how success was determined or measured.

4.3 Format Requirements

The following format, sequence, and instructions should be followed in order to provide consistency in Proponent response and ensure each proposal receives full consideration. With all pages consecutively numbered, the proposals should contain the following parts:

- a) Table of contents with page numbers.
- b) One-page executive summary.
- c) The body of the proposal in accordance with the above content requirements. This part is not to exceed 10 pages of combined text, tables, graphics and other written presentation in support of the content requirements.

5. Evaluation

The evaluation of responses will be conducted by a team consisting of employees and/or contractors of the Commission. All members of the team will be bound by the same standards of confidentiality.

This section details all of the mandatory and desirable criteria against which proposals will be evaluated. Proponents should ensure that they fully respond to all criteria in order to receive full consideration during the evaluation.

The lowest price or any Proposal will not necessarily be accepted. The Commission reserves the right to refuse any proposed based on quality, service, price, reputation, experience and other criteria.

The Preferred Proponent will be the Proponent scoring the most points after evaluation. The evaluation process will consist of the following stages:

- Stage One – Mandatory Criteria
- Stage Two – Desirable Criteria
- Stage Three – Reference Checks (optional)

5.1 Mandatory Criteria

Proposals not clearly demonstrating that they meet the following mandatory criteria will be excluded from further consideration during the evaluation process:

- **The Proposal must be sent and received before the designated closing date and time.**
- **The Proponent must confirm that any personal information received, collected or held over the course of the review will be stored and used only in Canada.**
- **The Proposal must contain an independence and objectivity statement by the Proponent.**
- **The Proposal must confirm compliance with the Commission’s vaccination policy.**

Failure to meet all mandatory criteria above will disqualify the Proponent’s Proposal from further review.

5.2 Desirable Criteria

The Commission seeks to enter into an agreement with the Proponent who, in the opinion of the Commission, has the resources, knowledge and competence to provide the greatest value. Proposals meeting all of the mandatory criteria will be further assessed against desirable criteria.

Desirable Criteria	Weight
Proponent’s Qualifications and Relevant Experience	35%
Suitability of Proposed Approach	35%
Pricing Hourly rate for services	30%

5.3 Reference Checks

The references of the Preferred Proponent may be contacted to validate any part of their responses. The Commission reserves the right to conduct such independent reference checks or verifications as they deem necessary to clarify, test, or verify the information contained in the responses and confirm the suitability of the Proponent. The Commission will not enter into a contract with any Proponent whose references are found to be unsatisfactory.

Reference Check Criteria	Weight
Client satisfaction with Proponent services and/or verification of Proposal responses	Pass/Fail