



REQUEST FOR PROPOSAL (RFP)

For

THE GOOD SAMARITAN SOCIETY and GOOD SAMARITAN CANADA (Good Samaritan) & GSC Deltaview

For

Offsite Records Storage

Locations: Alberta and British Columbia

RFP Number: P103-2022-004

RFP Closing Date: 22 MARCH 2022

Time: 23:59:59 P.M. Mountain Standard Time (MST).

Proposal Submission:

Attention: Rick Hessels, Manager- Procurement & Contracts Management

Address: Purchasing@gss.org

Inquiries Contact:

Same as above

Email Address: Purchasing@gss.org

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1. BACKGROUND

- 1.1 The Good Samaritan has 29 care homes across British Columbia and Alberta. The Good Samaritan is a non-profit, charitable organization that provides specialized care services for the elderly, disabled and those in need or at risk.
- 1.2 Good Samaritan's **Mission** is:
 - (a) To extend Christian hospitality through a continuum of care to those in need or at risk, regardless of race or religious belief.
- 1.3 **Our Vision** - To grow in strength, excellence and creativity in caring for others.
- 1.4 **Our Values** - Reflecting Christian hospitality, the values of the Good Samaritan are:
 - (a) **Healthy Relationships:** In a spirit of compassion, we work in supportive partnerships and open our hearts to others by affirming their goodness and potential.
 - (b) **Hospitable Environments:** We provide safe, comfortable communities inspiring involvement, where people experience a sense of caring, belonging and purpose.
 - (c) **Servant Leadership:** We lead through giving of ourselves in service to others, by acting with courage in a trustworthy and ethical manner.
- 1.5 Good Samaritan continuously build on aspects of “safety, quality, integrity, open and honest communications” with all stakeholders and support the protection of environment, particularly as they relate to the communities we work in and the people that may be touched by our projects.
- 1.6 Additional information regarding Good Samaritan could be found at our website through the following link: <https://gss.org/>

2. INTENT

The Society is issuing a Request for Proposal (RFP) from NAID/i-Sigma AAA certified providers to provide Offsite Records Storage Services in environmentally secure Storage Facilities.

The term of contract will be for three (3) years, with the possibility of extending by two (2) additional one-year options.

3. PROJECT DELIVERABLES/SCOPE OF WORK

- a) Long-term preservation of Records;
- b) New Transfers to offsite storage;
- c) Transportation services for Retrievals and Returns;
- d) Destruction;
- e) Accessioning and barcoding (or other tracking procedure) of Boxes;
- f) Reporting and usage statistics;
- g) Rush and after-hours services as required by GSS; and

- h) Offsite tape storage, tape library management and on-demand media handling and transportation.

4. RFP KEY DATES

Good Samaritan anticipates following the below procurement schedule:

Description	Anticipated Date
RFP Issue Date	8 March 2022
RFP Closing Date and Time	22 March 2022
Notification of Selection	Week of 21 March 2022
Project Commencement Date	1 April 2022

5. SUBMISSION REQUIREMENTS

- a) Proponents are required to organize their Submission clearly and succinctly, to present the required information. Use the main headings and present the information substantially in the order provided.
- b) Proposals must be submitted by email to Purchasing@gss.org. The Proponent is responsible for ensuring the Proposal is received before the RFP Closing Date and Time.
- c) To maintain the integrity of the process, any Submission received after the RFP Closing Date and Time will be rejected. Good Samaritan assumes no responsibility for server availability or any other technical problem that may prevent a Submission from being received by Good Samaritan prior to the RFP Closing Date and Time.
- d) The official time for receipt of Submissions will be as determined by Good Samaritan.
- e) Proponents are advised to pay careful attention to the wordings used throughout the RFP, as failure to satisfy any term, condition or requirement may result in the rejection of the Proposal.
- f) Proponents are responsible for examining the complete RFP document (including Addendum(s), if any), and shall fully inform themselves of all conditions which may affect their Submission and performance of the project deliverables.
- g) The RFP Submission should be limited to no more than twenty (20) single-sided, 8½" x 11" pages or equivalent (e.g. 11" x 17" fold out sheets for charts, schedules, etc. count as 2 pages).

- h) The page limit excludes a cover letter, table of contents and individual's resumes.
- i) Proponents should use an easy to read font type and size, such as 11-point Calibri or 12 points Times New Roman.
- j) Proponents may amend, and/or withdraw their Submission prior to the RFP Closing Date and Time by submitting a clear and detailed written notice of change to Good Samaritan.
- k) Clarifications requested by Proponents must be in writing and made no later than three (3) Business Days prior to the RFP Closing Date and Time. The reply, if any, may be provided directly to the enquirer or sent to all Proponents of record, in the form of an addendum (if required).
- l) Good Samaritan may in its sole discretion, extend the RFP Closing Date and Time, or amend, suspend, postpone or cancel the RFP, wholly or partially, at any time before or after the RFP Closing Date and Time, without incurring liability whatsoever to any interested party, Proponent, Team Discipline, Key Individuals or other persons.
- m) All Proposals become irrevocable after the RFP Closing Date and Time. Submitted Proposals shall be final and binding on the Proponent for sixty (60) days from the RFP's Closing Date and Time and may not be altered by subsequent offerings, discussions, or commitments unless the Proponent is asked to do so by Good Samaritan.
- n) The Proponent is responsible for all costs associated with preparing and submitting its Proposal to Good Samaritan under this RFP.
- o) No verbal agreement or conversation made or had at any time with any officer, employee, contractor, agent or consultant of Good Samaritan, nor any oral representation by any such officer, employee, contractor, agent or consultant, shall add to, detract from, affect or modify the terms of the RFP or the Contract, or be relied upon in any way whatsoever, unless specifically incorporated in a written addendum to the RFP and issued by Good Samaritan.

6. CORPORATE PROFILE

The Proposal must include the following:

REQUIREMENTS	PROPONENTS RESPONSE
.1 The legal name of the Proponent with organizational chart;	

<p>.2 Proponent’s contact for all questions and clarifications arising from the Proposal and for ongoing account management. The contact information should include the person’s title, address including email, telephone and facsimile number; and Accounts Receivable contact for all Invoicing inquiries.</p>	
<p>.3 Provide details of any subcontracting arrangements proposed by the Proponent, including subcontractor’s legal name and address.</p>	
<p>.4 Proponent must be NAID/i-Sigma certified. Please provide evidence of Certification.</p>	

7. PROJECT EXPERIENCE AND PAST PERFORMANCE

<p>REQUIREMENTS</p>	<p>PROPONENTS RESPONSE</p>
<p>.1 Demonstrate experience with performing previous projects of this scale and size, similar to this project, by providing summaries of three (3) reference projects, completed within the last five (5) years. For each referenced project, provide the:</p> <p>(a) Title and brief description of project</p> <p>(b) Project value</p> <p>(c) Project location</p> <p>(d) Client for which the project was performed</p>	

<p>(e) Client contact details that have working knowledge of the project’s quality, budget and schedule, including the names and phone numbers of references. By submitting those references, the Proponent authorizes GSS to contact these references on behalf of this project.</p> <p>(f) Reference projects may include previous similar jobs performed for the Good Samaritan.</p>	
<p>.2 Identify any special needs, risks or considerations that Good Samaritan may not have identified and suggest approaches for addressing them.</p>	

8. PRICING

- 12.1 The Proponent shall propose the sum of their project contribution in **Proposal Sheet Summary**, attached. In the event of inconsistency between the words and the amount, the words shall prevail. The breakdown of the pricing and additional hourly rates are to be detailed in Appendix A.
- 12.2 The completed **Proposal Sheet Summary** must be signed by the authorized representative of the Proponent, and submitted with the Proposal.
- 12.3 The Proponent, its personnel and providers are not Good Samaritan employees, therefore, they are responsible for their own personal income tax, Canada Pension Plan (CPP), Employment Insurance (EI), disability insurance and any other payroll burdens, or deductions required to be deducted by law.
- 12.4 The Proposal rates shall be firm for the duration of the Contract term, and shall be unaffected by fluctuations in foreign exchange.

9. PROPOSAL EVALUATION

The Evaluation Committee will use the following evaluation criteria to rate Proposals. The ratings are confidential, and no totals or scores of the ratings will be released to any party, outside Good Samaritan and the Evaluation Committee, strictly on a need to know basis.

EVALUATION CRITERIA		
(a)	Corporate Profile	10%

(b)	Scope of Work Compliance (Schedule A)	30%
(c)	Project Experience and Past Performance	30%
(d)	Pricing	30%
	TOTAL:	100%

APPENDIX 'A' – PROPOSAL SHEET SUMMARY
(To be signed by the Proponent and submitted with the Proposal)

1. **FROM (Proponent):**

(Proponent Legal Name)

(Proponent Operating Name)

(Mailing Address)

(City, Province, Postal Code)

(Email Address)

(Telephone)

2. **TO: ATTENTION:** Rick Hessels
Email: Purchasing@gss.org
RE: REQUEST FOR PROPOSAL (RFP)

for

Project Location: Good Samaritan Society (A Lutheran Social Service Organization), Good Samaritan Canada, and Good Samaritan Deltaview Care Centre Ltd.

for

Project Name: Offsite Records Storage

3. By submitting this Proposal, I/We agree to be bound by the terms and conditions of the RFP and declare that I/We:

(a) examined and read the RFP document for the above noted project;

- (b) understands the RFP documents, including the terms and conditions;
- (c) confirm receipt of all addenda issued for the RFP, if any;
- (d) considered those addenda in the preparation of this Proposal;
- (e) declare that no person, firm or corporation other than the undersigned has any interest in this Proposal or in the proposed Contract for which this Proposal is made;
- (f) have noted no discrepancies, errors or omissions in the RFP except those previously brought in writing to the attention of Good Samaritan and which have been clarified by an addenda, if any;
- (g) am/are competent to undertake and complete the project deliverables;
- (h) have relied upon our own examination of the project deliverables, and have informed ourselves fully as to all conditions, contingencies, risks and circumstances, local or otherwise, which might influence or affect the performance or the cost of the project;
- (i) in good faith, agree to work towards executing a formal agreement with Good Samaritan for the project if selected as the successful Proponent under this RFP.
- (j) agrees to carry out the Services in accordance with the pro forma Contract issued with the RFP Documents,
- (k) for the total price of:

\$

(amount in numbers)

(amount in Words)

Which amount(s) include taxes as separate line item(s) on this Submission.

I/We agree:

- (a) Reimbursable expenses will be paid in accordance with the terms of the Contract.
- (b) to execute a formal agreement with Good Samaritan for the performance of the Services and for the above stated compensation if selected as the successful Proponent.

Submitted this _____ day of _____, 2020.

Signed: _____

(Name and Title of the Proponent's authorized individual)

APPENDIX 'B' – PRO-FORMA CONTRACT TEMPLATE

SCHEDULE- 'A'- SCOPE OF WORK

Section	Description	Compliance (Yes or No)
1. Authorized Users	<ul style="list-style-type: none"> a) GSS will provide and maintain an updated list of Authorized Users to the Contractor. b) The Contractor will transfer, store, retrieve, return or remove a given Box only as identified by an Authorized User. c) Service Initiation <ul style="list-style-type: none"> i. Authorized Users will contact Contractor directly via automated system, phone, or email to initiate the pickup of New Transfers or Boxes. d) New Transfers to Storage Facility(ies) <ul style="list-style-type: none"> i. Authorized Users will contact Contractor directly to initiate the pickup of new boxes e) Retrievals and Returns to Storage Facility(ies) <ul style="list-style-type: none"> i. Authorized Users will contact Contractor directly to request the retrieval of Boxes from Storage Facility(ies) f) Records Destruction from Storage Facility(ies) <ul style="list-style-type: none"> i. Authorized Users will provide reports on notice to permanently remove and destroy Boxes 	
2. Records Storage	<ul style="list-style-type: none"> a) The Contractor will store Boxes in a Storage Facility(ies) in a way that is consistent with industry best practices to prevent damage. Boxes will be distributed within the 	

	<p>Storage Facility to prevent mass destruction of GSS records by a single event.</p> <ul style="list-style-type: none"> b) Storage Facilities must be located in Canada. c) Contractor will not move Boxes to another Storage Facility unless approved in writing by GSS. d) The Contractor will re-box and relabel damaged Boxes as necessary to ensure safe and secure storage, and Retrieval. e) Any damage or loss to the Boxes while under the custody of the Contractor must be reported to GSS within 24 hours in order to limit the impact of the loss of information. 	
<p>3. Transfers, Retrievals and Returns</p>	<ul style="list-style-type: none"> a) The Contractor will provide on demand Retrieval. b) All Boxes must be barcoded and tracked by the Contractor to enable quick and easy storage, tracking and retrieval of the Boxes c) When requested, Contractor will produce detailed reports regarding Retrievals and which person the Boxes were delivered to. d) The Contractor will pick up unlimited Transfers, Returns and/or Retrievals. e) The Contractor will provide transportation services for New Transfers, Retrievals, and Returns to and from the Storage Facility. f) The Contractor will track and produce a receipt stating exactly which Boxes were retrieved from the Storage Facility on a given day (upon request). g) The Contractor will: <ul style="list-style-type: none"> i. Have the Boxes ready for delivery within the defined service levels. ii. Provide a receipt to GSS by e-mail to gssap@gss.org 	

	<p>indicating the date and time of the pickup/retrieval, the number of Boxes that were picked up/retrieved and the name and signature of the witnessing person at GSS.</p> <ul style="list-style-type: none"> iii. The Contractor will assign a barcode, or similar tracking method, to each Box entering the Contractor’s Storage Facility based on GSS’s Box number. h) The Contractor will maintain a register linking the Box number to a physical bar-coded location, or other tracking method, in the Contractor’s Storage Facility. i) The Contractor will use this register to identify and retrieve requested Boxes within the service levels. 	
<p>4. Destruction</p>	<ul style="list-style-type: none"> a) Upon request, the Contractor will prepare Boxes to be permanently removed or destroyed within five (5) business days of receiving written notice and instructions from GSS. b) The Contractor will NOT Destroy Boxes without written authorization from GSS. c) The Contractor will use an approved form of destruction and provide paper document cross shredding services to 1/8” cuts or better. Smaller shred sizes are acceptable for destruction; however, larger shred sizes are not acceptable. d) The Contractor will provide GSS with a certificate of destruction, or similar proof of destruction, for all Boxes Destroyed including box information, date of destruction, and the name of the Authorized User who made the request. 	

<p>5. Off-Site Tape Retrieval/Storage/Return</p>	<p>Please reference Schedule-B Scope of Work Offsite Tape Retrieval/Storage/Return</p>	
<p>6. Reporting</p>	<p>a) The Contractor will provide ad hoc reports within three (3) business days of the request. Example reports include but are not limited to, the number of Boxes, Retrievals or the number of rush Retrievals.</p>	
<p>7. Service Levels</p>	<p>a) Regular Hours</p> <ul style="list-style-type: none"> i. The Contractor will provide the Services during normal GSS hours and will work with GSS to perform the Transfers, Retrievals and Returns during mutually agreeable times <p>b) Rush / After Hours Service</p> <ul style="list-style-type: none"> i. On an emergency basis, the Contractor will provide Services outside GSS's specified regular business hours. ii. The Contractor will provide rush delivery of Boxes within two (2) hours of receipt of request from an Authorized User. iii. The Authorized User requesting the rush Retrieval(s) will specify the courier name and account number to be used for the delivery of the Records. <p>c) Inquiries</p> <ul style="list-style-type: none"> i. The Contractor will respond with an e-mail acknowledgement to originator to inquiries from GSS about Transfers, Retrievals and Returns, and Destruction of Boxes within two (2) business hours. <p>d) New Transfers</p>	

	<ul style="list-style-type: none"> i. The Contractor will pick up New Transfers from GSS within three (3) business days of being notified. New Transfers will occur during regular hours 9:00 to 3:00 pm, Monday to Friday excluding holidays. ii. Contractor must inform GSS of any delays that exceed the three (3) business day period <p>e) Retrievals</p> <ul style="list-style-type: none"> i. Contractor will retrieve and deliver Boxes to GSS within twenty-four (24) hours of receipt of a request from an Authorized User. ii. Contractor must inform GSS of any delays that exceed the twenty-four (24) hour period. <p>f) Returns and Refiling</p> <ul style="list-style-type: none"> i. The Contractor will track whereabouts of the Boxes at all times. ii. The Contractor will ensure that a process exists to make certain that Returns are placed back into their original location in the Storage Facility within a reasonable time <p>g) Research Area</p> <ul style="list-style-type: none"> i. The Contractor will provide a viewing room at the Storage Facility suitable for file reference and research activities during normal business hours. The room will be equipped with tables and chairs as well as power outlets for computers, tape recorders, fax machines, and/or other equipment. The Contractor 	
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	<p>will provide access to a scanner, photocopier, telephone, and or facsimile machine as required.</p> <ul style="list-style-type: none"> ii. The viewing room will be available to GSS upon twenty-four (24) hours written notice. iii. Only Authorized Users with proper ID or persons accompanied by Authorized Users can access the records. <p>h) Storage Facility Standards and Conditions</p> <ul style="list-style-type: none"> i. The Contractor Storage Facility(ies) must comply with local Building Code, local Fire Code and any other local, municipal, provincial or federal code regulations ii. The Contractor and the Storage Facility(ies) must have contingency plans in place to respond to local and provincial disasters (eg. forest fires, floods, tornados, earthquakes, pandemics, etc.) <p>i) Security Standards</p> <ul style="list-style-type: none"> i. The Contractor will allow an Authorized Representative of GSS full access at all reasonable times to the Boxes, Records and Storage Facilities for purposes of audit, inspection or verification. <p>j) Vehicle/Records Transport</p> <ul style="list-style-type: none"> i. To prevent intrusion and damage, Boxes will be transported in a (preferably non-identifiable) enclosed vehicle ii. All Contractor staff or third-party couriers must be bonded and FOIP/HIA (Alberta) and FIPPA (BC) compliant. 	
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<p>8. Fee Schedule should include:</p>	<ul style="list-style-type: none"> a) Regular Service – New Transfers and Retrievals b) Record (box) destruction c) Storage fees d) Rush Same Day Service e) Emergency Delivery Service (2-hour turnaround time) f) Offsite tape storage g) Any other services offered <p>Invoicing to be issued monthly.</p> <p>Provide different pricing scenarios and their associated pricing such as:</p> <ul style="list-style-type: none"> a) Pickup of Transfers, Retrievals and Returns b) Minimum Box Delivery Charges c) Destruction of Boxes in storage d) Storage fees for boxes e) Monthly storage fees per item 	
<p>9. FOIP/HIA (Alberta) and FIPPA (BC)</p>	<ul style="list-style-type: none"> a) Contractors should note that GSS is subject to FOIP/HIA (Alberta) and FIPPA (BC) that poses significant obligations to protect personal information in the course of providing any service to GSS. Therefore, Contractors MUST comply with FOIP/HIA and FIPPA. b) Legislation also applies to the protections and disclosure of the terms of any contract between the Contractor and GSS. 	
<p>10. Misc.</p>	<ul style="list-style-type: none"> a) The Contractor will be responsible for providing the transportation and transfer of current storage items from current service provider to Contractor’s Storage Facility(ies), along with conversion of tracking records and box labelling. 	

SCHEDULE B- SCOPE OF WORK: OFFSITE TAPE RETRIEVAL / STORAGE / RETURN

Section	Description	Compliance (Yes or No)
<p>1. Access</p>	<ul style="list-style-type: none"> a) The Contractor will enable GSS to access the secure tape library facility and management system as needed. b) GSS has 3 pick-up locations: 2 located in the Edmonton area and 1 located in Delta, BC. with their own tapes requiring separate storage, which includes separate containers, vaulting, authorization and access to the tape library facility and management system. 	
<p>2. Preferred Method</p>	<ul style="list-style-type: none"> a) The preferred method for tape library management and media is vaulting. 	
<p>3. Storage Facility</p>	<ul style="list-style-type: none"> a) The Contractor shall be capable of storing all data tapes in a single Storage Facility for each location. b) The Contractor shall be NAID AAA certified. c) The Contractor shall provide data tape storage in a safe, secure and temperature-controlled environment with an automatic fire suppression system other than liquid (fire detection only is not acceptable). d) The Contractor shall be able to provide adequate protection of storage items in the event of flooding, water damage, and any other natural disasters like tornados. 	
<p>4. Storage Management, Retrieval and Delivery of Tapes</p>	<p>The Contractor shall be able to provide the following services:</p> <ul style="list-style-type: none"> a) Tape pull, re-filing of container and/or tape media library with requested tapes, tape searches in vendor’s tape library management system. b) Weekly scheduled delivery and pick-up of tapes to and from GSS address specified. Contractor shall be able to transport to multiple addresses if necessary. 	

	<ul style="list-style-type: none"> c) All confirmation of deliveries and pick-ups shall be provided in a hard copy or electronic format. d) Contractor shall track tape expiration and provide expired tapes to GSS for destruction or reuse. e) Tape pull, tape searches, and transport services shall be available 24 hours and 7 days a week and completed within 3 hours from the time GSS request for emergency delivery (Critical Special Transport) and 24 hours for standard delivery (Standard Transport). Standard transport shall be completed the next business day. f) Tape containers shall be secure throughout the entire retrieval and transportation and opened only by authorized Contractor or GSS personnel. g) Tapes shall be transferred between GSS and the Contractor’s Storage Facility in secure and safe containers. 	
<p>5. Destruction of Tapes</p>	<ul style="list-style-type: none"> a) Contractor shall not destroy any GSS tapes. 	
<p>6. Online (Website) Service Request Capability</p>	<ul style="list-style-type: none"> a) Contractor shall provide an online tape storage management system with capabilities for GSS to request service and search inventory, service orders, supplies, and invoices. b) Contractor’s online tape storage management system shall be available 24/7 for multiple GSS users with individual login credentials. 	
<p>7. Local Service Request Capability</p>	<ul style="list-style-type: none"> a) Contractor shall be able to receive and process service requests by means of a local or toll-free phone call, email for such services as ordering services/supplies, inventory research, and invoice inquiries. 	
<p>8. Tape Transaction Confirmation</p>	<ul style="list-style-type: none"> a) Paper/electronic confirmations shall be provided for all tape transactions. Confirmations shall include data/time stamp of tape transportation, tape identification number, two party digital signatures of authorized personnel, and reconciliation and verification of tapes within tape library management system. 	

9. Monthly Activity Report	a) Contractor shall provide monthly transaction reports showing tapes accepted, inventory updates, references, refiles, and interfiles, and destructions or discards	
10. Tape Management System Maintenance	a) Contractor shall maintain up to date records in tape library management system. Maintenance includes contacts, authorized personnel profiles and access controls, tape transaction confirmations, and tape expiration dates.	
11. Tape Storage Facility Changes	a) All tape Storage Facility changes shall receive prior authorization from GSS	
12. Receiving of Tapes by New Contractor	<p>a) If the contract is awarded to a Contractor other than the current Contractor, transportation of the tapes from the current Contractor's Storage Facility to the new Contractor's Storage Facility shall be responsibility of the new Contractor.</p> <p>b) The current Contractor shall prepare the tapes for pick-up, however, the new Contractor shall provide containers for the incumbent to load tapes onto. The new Contractor shall be able to use existing tape identification numbers, and have the ability to integrate customer or competitor bar codes into their tape library management system.</p>	