



RFP for Non-Profit Emergency Preparedness and Business Continuity Planning Project

1. Title of Project

Non-Profit Emergency Preparedness and Business Continuity Planning Project

2. Introduction

Carya, as chair of the Non-Profit Business Continuity Planning Project Steering Committee, is requesting proposals from professionals to provide business continuity training, program development, and to support the identification of opportunities for integrated continuity strategies for non-profit organizations in Calgary.

3. Background

Following the 2016 Wood Buffalo Wildfire response, using funds allocated by Red Cross, The United Way of Calgary & Area released a call for proposals to identify organizations to provide emergency preparedness and business continuity support to Calgary non-profit organizations individually and as a part of a network to respond to an emergency. Organizations that maintain comprehensive business continuity and emergency response programs will be better prepared to mitigate service interruptions and therefore be more likely to contribute to a coordinated emergency response in community. Carya was awarded funding from this call for proposals beginning April 1 2018 – March 31 2019. The budget allocation for contracted services for this RFP is a maximum of \$100,000.

3.1. Project Vision

A sustainable framework for business continuity planning is established for the non-profit sector that provides an integrated, collaborative, and inter-sectoral approach for non-profit organizations to develop strategies to ensure continued service delivery during and after a service disruption.

3.2. Project Mission

To provide coordinated business continuity planning support and resources for non-profit organizations and to collaborate with participating members to build capacity for business continuity through an integrated, inter-sectoral approach.

3.3. Target Audience

The Critical Service Provider (CSP) group facilitates increased coordination and communication between the non-profit sector and The City of Calgary's emergency response. The CSP group is intended as a resource to supplement The City's response in order to provide effective service delivery to people and communities impacted by an emergency event in Calgary, with an emphasis on people experiencing greater vulnerability.

The CSP group was chosen as the target audience for the Non-Profit Emergency Preparedness & Business Continuity Planning Project as an established network of organizations engaged in emergency

preparedness and response planning with The City of Calgary. CSP members are expected to maintain an active emergency response and business continuity programs as a best practice to mitigate service disruptions during an emergency or disaster.

3.4. Project Objectives

- Participating organizations receive support, through workshops and one-on-one third party consultant expertise, to implement and/or review their business continuity program
- Participating organizations are provided with an opportunity to establish shared continuity strategies with other participating organizations
- The project model of business continuity program support will be to inform the development of a sustainable strategy and collective impact model for business continuity program support across the non-profit sector
- Ensure this project is aligned with current municipal emergency response planning and business continuity programs

3.5. Current Project Status

- Project steering committee has been established and is meeting monthly
- An initial assessment of the CSP group has been completed to determine the current state of organizations' business continuity program, barriers and needs for support related to business continuity planning, and status of formal and informal agreements related to continuity strategies
- Members of the CSP group were convened to further discuss business continuity planning needs to inform further development of the project

3.6. Project Steering Committee

The project Steering Committee consisting of the following organizations:

- Carya (Chair)
- Distress Centre
- Boys & Girls Clubs of Calgary
- Wood's Homes
- Federation of Calgary Communities
- The City of Calgary
- Insurance industry representative

The steering committee will work collaboratively to:

- Engage with the Critical Service Provider group to identify key areas of need related to business continuity support and resources
- Support the identification of appropriate resources to support participating organizations to develop, complete and sustain a business continuity program

- Support participating organizations to identify opportunities for collaboration and integration of continuity strategies
- Support participating organizations to align business continuity best practices with current municipal emergency response and business continuity planning

4. Project Scope

In collaboration with Carya and the Project Steering Committee, the contractor will work with identified non-profit organizations within the Critical Service Provider group to:

- Provide business continuity training through workshops and one on one consultation
- Provide business continuity program development support including the following subject areas:
 - Program initiation and management
 - Risk assessment
 - Business impact analysis
 - Business continuity strategies
 - Incident response
 - Plan development and implementation
 - Awareness and training
 - Business continuity plan exercise, assessment, and maintenance
 - Crisis communications
 - Coordination with external agencies
- Support the identification of opportunities for integrated business continuity strategies between participating non-profit organizations
- Explore the development of integrated business continuity plan exercises between participating organizations
- NOTE: the CSP group consists of approximately 20 non-profit organization service providers with varying degrees of business continuity planning, support needs, and barriers to business continuity program development. Not all CSP members will require the same level of business continuity planning support, however the intention of this project is to include all participating members in activities that explore integrated continuity strategies and exercises

4.1. Additional Requirements

- Provide recommendations to the project Steering Committee on the development of a sustainable, integrated, business continuity program support framework for non-profit organizations
- Curriculum design and draft delivered to the Steering Committee by October 19, 2018. (Note: all templates, guides, training material created, made or originated by the proponent in

performing the services under this agreement shall be the sole and exclusive property of Carya, following the end of the project)

- First training delivered by November 16, 2018
- Interim training satisfaction survey results submitted to the Steering Committee after first training in order to determine if a pivot/quality check is needed before implementation of further training
- Provide status updates to the project steering committee Chair after significant milestones have been achieved and if emerging issues develop that will affect the project's success
- Develop, conduct, and report on evaluations that assess the effectiveness of the activities led by the contractor
- Participate in project evaluation
- Travel within the city of Calgary will be required in order to attend meetings with participating organizations and the project Steering Committee. Any travel costs incurred (mileage; parking, etc) will be the responsibility of the contractor
- Complete the project by March 31, 2019. Contracted services will be required starting October, 2018

5. Appendices

- Project Background
- Steering Committee Terms of Reference
- CSP Business Continuity Planning Survey
- RFP Evaluation

6. General RFP Requirements

Please include the following in your proposal documents:

- Corporate profile of proponent
- Qualifications profile and experience of the proponent and lead personnel in business continuity planning for non-profits, particularly in Alberta and Canada
- Qualifications and experience of any sub-consultants and their lead personnel in the service areas being offered
- An outline of the activities proposed to complete the project as outlined in section 4.0
- Proposed approach to data collection and consultation with CSP group and subject matter experts
- Methodology including project management
- Proof of Insurance
- Fee proposal and terms
- Reference – Minimum of 3
- Proposed Communication plan with Carya

- Risks and challenges of the project – maximum of one page, include plan to mitigate/address risks/challenges
- A detailed work plan that includes a task timeline with specific staff and budget allocations including expected number of hours to complete project and hourly rate
- A Curriculum Vitae for the proposed individuals leading the project and outline of the qualifications of additional individuals/groups who may support the project (i.e. students, additional facilitators, etc.). Preference will be given to individuals with:
 - Business continuity professional certification and experience
 - Program design and development experience including project management
 - Knowledge of and experience working with the non-profit sector
 - Strong group facilitation skills
 - Demonstrated partnership and collaboration skills
 - Previous experience of the proponent in training, development and delivery
 - Previous experience in business continuity planning, emergency management and crisis management/communication

7. Selection Criteria

Proposals shall be evaluated to determine the best value offered against, but not limited to, and in no particular order, conformance to the following criteria:

- The proponent’s experience and ability in projects similar in size, complexity and nature
- Successful performance on projects of similar scope
- Fee schedule
- Compliance with Request for Proposal document

8. Confidentiality

Proponents are expected to keep confidential all documents, data, information and other materials of Critical Service Provider Agencies, which are provided, obtained or assessed by proponent in relation to this RFP and not make any public announcements or news releases regarding this RFP or the entering into an agreement pursuant to this RFP, without the prior written approval of Carya. Successful proponent will not solicit business opportunities with agencies participating in this project during the contracted period.

9. Indemnification

As respects acts, errors or omissions in the performance of professional services, the successful proponent agrees to indemnify and hold harmless Carya, its officials, officers, and employees from and against any and all claims, losses, damages, defense costs, or liability, of any kind or nature, arising directly out of the successful proponent’s (or proponents contractors’ or subcontractors’, if any) negligent acts, errors or omissions in the performance of professional services under this RFP.

As respects all acts, errors or omissions which do not arise directly out of the performance of professional services, including but not limited to those acts, errors or omissions typically covered by general and automobile liability insurance, the proponent agrees to indemnify, defend (at Carya's option), and hold harmless Carya, its officials, officers, employees, agents and representatives from and against any and all claims, losses, damages, defense costs, or liability, of any kind or nature, arising out of or in connection with the proponent (or proponent's contractors' or sub-contractors' if any) acts, errors omissions, or work, relative to this Agreement; except for those claims which arise out of the sole negligence or willful misconduct of Carya.

The obligations set forth in this indemnification provision a) shall be in effect without regard to whether or not Carya, proponent or any other person maintains or fails to maintain, insurance coverage, or a self-insurance program, for any such claims and b) shall survive the termination of this Agreement.

10. Submission Detail

- Email questions may be submitted to Kim Savard at kims@caryacalgary.ca . All proponent questions will be shared with all RSP respondents. Please register your email at the same address as above to receive notifications. No phone call questions will be accepted
- One 60 minute discovery meeting will be held on September 5, 2018 from 10:00 a.m.-11:00 a.m. at 5000 Bowness Rd. NW in the downstairs boardroom. There will be a 30 minute overview of the project and 30 minutes for questions. If you plan to attend, please R.S.V.P. at the above email address by end of day, Friday August 31, 2018
- 4 hard copies and one electronic copy of the proposal marked "Non-Profit Emergency Preparedness and Business Continuity Project" will be received at the Carya Reception Desk at 5000 Bowness Rd. NW no later than 4:00 p.m. on September 17th, 2018. E-mailed copies can be submitted to kims@caryacalgary.ca. Submissions received after this time will not be accepted
- Carya reserves the right to cancel this Request for Proposal for any reason without liability to any proponent or to waive irregularities at their own discretion
- Proposals shall be irrevocable until Carya awards this contract, cancels this Request for Proposal for any reason without any liability to any proponent or to waive irregularities at their own discretion
- All prices to be in Canadian funds
- All proposals will remain confidential, subject to the Freedom of Information and Privacy Act

11. Inquiries

All inquires and clarification of the terms and conditions of this proposal shall be directed to Kim Savard at the contact information below. No member of the Steering Committee shall be contacted as part of the inquiry process.

Kim Savard
Program Manager, Carya

T: 403-286-1811
kims@caryacalgary.ca

Appendix A – Project Background

Non-Profit Emergency Preparedness and Business Continuity Planning Project

Background

Following the 2016 Wood Buffalo Wildfire response, using funds allocated by Red Cross, The United Way of Calgary & Area released a call for proposal to identify organizations to provide emergency preparedness and business continuity support to Calgary non-profit organizations individually and as a part of a network to respond to an emergency. Carya was awarded funding from this call for proposal beginning April 1 2018 – March 31 2019.

Project Vision

A sustainable framework for business continuity planning is established for the non-profit sector that provides an integrated, collaborative, and inter-sectoral approach for non-profit organizations to develop strategies to ensure continued service delivery during and after a service disruption.

Project Mission

To provide coordinated business continuity planning support and resources for non-profit organizations and to collaborate with participating members to build capacity for business continuity through an integrated, inter-sectoral approach.

Preamble

The Critical Service Provider (CSP) group facilitates increased coordination and communication between the non-profit sector and The City of Calgary's emergency response. The CSP group is intended as a resource to supplement The City's response in order to provide an effective service delivery to people and communities impacted by an emergency event in Calgary, with an emphasis on people experiencing greater vulnerability.

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Project Objectives

- Participating organizations receive support, through workshops and one-on-one third party consultant expertise, to complete a business continuity plan

- Participating organizations are provided with an opportunity to establish shared continuity strategies with other participating organizations
- The project model of business continuity planning support will be to inform the development of a sustainable strategy and collective impact model for business continuity planning support across the non-profit sector
- Ensure this project is aligned with current municipal emergency response and business continuity planning

Proposed Project Plan

- Establish a steering committee
- Develop Terms of Reference
- Finalize project description and work plan
- Engage with CSP group and Identify status of their organization's business continuity program
- Develop an RFP for a Business Continuity Consultant to provide workshops and one-on-one consultation to non profit agencies
- Review the proposals and hire a consultant
- Identify areas for further collaboration specific to supporting individual agencies business continuity planning
- Explore the possibility of developing a collective impact model to support a sustainable framework for non profit business continuity planning

Appendix B – Steering Committee Terms of Reference

Non-Profit Emergency Preparedness and Business Continuity Planning Project Steering Committee Terms of Reference

Project Background

Following the 2016 Wood Buffalo Wildfire response, using funds allocated by Red Cross, The United Way of Calgary & Area released a call for proposal to identify organizations to provide emergency preparedness and business continuity support to Calgary non-profit organizations individually and as apart of a network to respond to an emergency. Carya was awarded funding from this call for proposal beginning April 1 2018 – March 31 2019.

Members

Given the relatively short timeline of the project, a small steering committee has been formed to help guide the project. Membership is made up of representation from the Critical Service Provider group.

Members include:

- Carya (Chair)
- Distress Centre
- Boys & Girls Clubs of Calgary
- Wood's Homes
- Federation of Calgary Communities
- The City of Calgary
- Insurance Consultant

Purpose

The steering committee will work collaboratively to:

- Engage with the Critical Service Provider group to identify key areas of need related to business continuity support and resources
- To support the identification of appropriate resources to support participating organizations to develop and complete a business continuity plan
- Support participating organizations to identify opportunities for collaboration and integration between business continuity plans
- Support participating organizations to align business continuity best practices with current municipal emergency response planning

Chair Responsibilities (Carya)

- Convene and facilitate regularly established steering committee meetings
- Coordinate administrative and financial responsibilities for the project
- Develop project implementation work plan in consultation with steering committee members
- Maintain regular communication with steering committee and stakeholders
- Accountable to the funder for communicating updates on the progress of the project
- Develop and implement, in consultation with the steering committee, an evaluation framework for the project
- Completion and submission of project final report

Member Responsibilities

- Attend regularly scheduled meetings
- Support the development of the project implementation work plan
- Support with the identification of opportunities for integration and collaboration of business continuity plans between participating organizations
- Support the development of a Request for Proposal to secure a consultant that will offer workshops and one-on-one business continuity planning support to participating organizations
- If capacity allows, mentor similar sector organizations to complete their business continuity program
- Explore the development of a collective impact model

Meeting Schedule

- Meet on a monthly basis or as needed, to completion of project

Appendix C – CSP Survey and Survey Results

Non-Profit Emergency Preparedness and Business Continuity Planning Project

Name of Organization:

1. What geographical quadrant(s) does your organization operate in?

2. How large is your organization (i.e. number of employees)?

3. Does your organization have a completed Business Continuity Plan?

Yes No Partial

a) If **Yes**, do you review and update your Business Continuity Plan?

Yes No If **Yes**, how often?

b) If **No** or **Partial**, what are the barriers to completing a Business Continuity Plan?

Comments:

4. Does your organization have a designated employee who is responsible for Business Continuity Planning? Yes No

5. Does your organization have any formal agreements with other agencies to support continuity of services during a disruption? Yes No

If **Yes**, please describe which organization(s) and the type of agreement(s)?

6. **Does your organization have any informal agreements with other agencies to support continuity of services during a disruption?** Yes No

If **Yes**, please describe which organization(s) and the type of agreement(s)?

7. **Is your organization interested in exploring formal/informal business continuity partnerships with other non-profit organizations?** Yes No

Comments:

8. **Does your organization provide any emergency preparedness training to employees?**

Yes No

Comments:

Thank you for taking the time to complete this survey. Information gathered from the survey will remain anonymous and will be summarized to help inform next steps of the project.

Appendix D– Evaluation

Summary of Evaluation

The following is an overview of all the categories and weighting relevant to the evaluation of proposals under this RFP.

Category: Evaluation Criteria	Weight	X	Rating	Total Score
Proponent Qualifications	10 Points			
Proponent Experience	10 Points			
Project Goals and Objectives	5 Points			
Proposed Methodology	5 Points			
Realistic Project Schedule	5 Points			
References	10 Points			
Price	5 Points			
Innovative Approach	5 Points			
TOTAL SCORE	55 Points			

Evaluation of Rated Criteria

Each proposal should include the information requested below under Proposal Content in respect of each of the Rated Criteria that the Selection Committee will evaluate.

<p>Qualifications</p>	<ul style="list-style-type: none"> • Business Continuity Certification • Demonstrated level of competency in the industry • Training or extensive experience in engagement and facilitation • Proven written and oral communication skills • Ability to work well individually and with a team
<p>Experience</p>	<ul style="list-style-type: none"> • Minimum of 2 years experience in program design, development and delivery, including project management • Minimum of 2 years experience in business continuity planning, emergency management and crisis management • Knowledge of and experience working with the non profit sector • Strong facilitation skills • Demonstrated partnership and collaboration skills • Proven experience in working on a project similar in size and complexity in nature
<p>Project Goals and Objectives</p>	<ul style="list-style-type: none"> • The proposal demonstrates an understanding of the scope, breadth and level of complexity of the project
<p>Proposed Methodology</p>	<ul style="list-style-type: none"> • Proponents demonstrate that they are familiar with best practices in business continuity methodologies
<p>Realistic Project Schedule</p>	<ul style="list-style-type: none"> • Proposed activities can be accomplished in a realistic time frame and by March 31, 2019
<p>References</p>	<ul style="list-style-type: none"> • References can confirm proponent’s qualifications against the criteria listed and provide specifics of work performed
<p>Price</p>	<ul style="list-style-type: none"> • Cost is appropriate and within budget for the activities proposed. The lowest offer will not necessarily be the winning bid

Evaluation and Scoring

All proposals will be evaluated and scored based on the outline below. The evaluation will be based on a 0-10 point scale.

Rating	Description
10	Exceeds expectations; Proponent clearly understands the requirement, excellent probability of success.
8	Somewhat exceeds expectations; high probability of success
6	Meets expectations; Proponent has good understanding of requirement, good probability of success.
4	Somewhat meets expectations; minor weakness or deficiencies, fair probability of success.
2	Does not meet expectations or demonstrate understanding of the requirements, low probability of success.
0	Lack of response or complete misunderstanding of the requirements, no probability of success.

Selection Process

The Selection Committee will evaluate and score all proposals. The three highest scored proposals will be shortlisted and may be asked to participate in a one hour presentation/interview process with the Selection Committee. (15 minute presentation; 45 minute interview)

The Selection Committee will consider the quality of the presentation/interview of each short listed proponent, combined with the scored matrix when awarding the contract.

In the event that one proponent scores significantly higher than all other proponent's, Cary's Selection Committee reserves the right to eliminate the short list process and proceed directly to negotiations with the highest rated proponent.