



## **Addendum No. 1**

### **Request for Proposals ADM-23-02 ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM SOFTWARE**

The addendum is being issued prior to the closing of the Request for Proposals to provide further information, make changes to, or to clarify the Contract Documents and is to be read, interpreted and coordinated with all other parts of the Contract Documents. In the case of a conflict with the balance of the documents, this Addendum shall govern. Proponents shall attach a signed copy of this addendum to their proposal. This addendum shall form part of the Service Agreement.

#### **Question 1: Will the RDFFG consider using SharePoint Online for storing the electronic content, or is the RDFFG looking for a separate, standalone records repository?**

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The RDFFG will consider proposals that use SharePoint Online for storing electronic content.

#### **Question 2: If electronic content can be stored on SharePoint OnLine, does the RDFFG have enough user licenses to provide for all users to access SharePoint?**

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Every employee in the office has a subscription to MO365 that includes SharePoint.

#### **Question 3: If the proposed solution is not DoD5015.2 Certified, does adherence to the critical requirements as stated in the standard have to be demonstrated in the RFP response? Can such adherence be demonstrated after selection?**

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DoD5015.2 Certification is not a hard requirement as long as the proposal is capable of explaining how it adheres to the critical requirements of the standard or confirming that it adheres to the critical requirements of the standard.

The preference is to know the proposed software solution adheres to the critical requirements of the standard prior to selection. The adherence can also be demonstrated during the presentations anticipated to be scheduled for June 7, 2023.

#### **Question 4: How many users need to be trained? How many admin users?**

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We are thinking it would work best as a “train the trainer” approach for the users. The Records Management Coordinator would be the primary trainer and develop the resources for the users.

In total, there would be three Admin Users (Records Management Coordinator, General Manager of Legislative and Corporate Services, and Manager of IT Services) that would require the most training.



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**Question 5: Is there a preference for how the training is to be provided – on-site, online, live remote?**

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The preference is for admin training to be on-site.

Additional training can be online or live remote.

**Question 6: How often does the RDFFG have to place legal holds? What is the frequency of having more than one legal hold in place at the same time?**

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The RDFFG currently does not have a legal holds system in place. The General Manager of Legislative and Corporate Services manages the legal issues for the RDFFG.

The RDFFG currently has a double-check in place for the destruction of physical records. When a Disposition Request form is submitted to approve records for destruction the General Manager of Legislative and Corporate Services reviews the request to confirm if the destruction should be withheld due to legal issues.

**Question 7: Is there a preference for redactions to be included as part of the software, or done through a third-party app (i.e. Adobe Acrobat Pro)?**

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We currently use Adobe Acrobat Pro for redaction.

If the EDRMS is able to redact records and there is no corruption or errors when viewing through Adobe Acrobat Reader then we are open to this option.

**Question 8: Is the RDFFG able to share their existing file plan or retention schedule?**

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The file plan is heavily influenced by the Local Government Management Association's "Records Management Manual, 5<sup>th</sup> ed."

We are unable to release the entire file plan publicly, however we can include a sample. This has been added as an Appendix to this Addendum.



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**Question 9: What are the details of the applications used as an example in this RFP? (Versions, On-prem or hosted, Database connections, API)**

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VADIM

Version: Vadim is Kept current

On-Prem or Hosted? On Prem but investigating hosted solution

Database that is available for integration? SQL Server

API compatible? Unknown

HUB – Land Management

Version: In house custom software

On-Prem or Hosted? On Prem

Database that is available for integration? Postgressql

API compatible? We can build one if required

eScribe

Version: Current

On-Prem or Hosted? Hosted

Database that is available for integration? Limited integration

API compatible? Limited to specific EDRMS systems

eScribe note: Current intention is manually upload records into the selected EDRMS rather than build in integration.

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**Question 10: Does the RDFFG have lists of physical records in an electronic format?**

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We have conducted a Records Inventory of the physical records in the office, however it is not complete and the Quality Checks have not been completed, so it is currently only incomplete raw data.

As per the RFP the conversion of physical records into digital is not in the scope of this initiative.

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**Question 11: Section 4.1, “Transfer of Technical Knowledge”. Would it be possible to release an org chart for the RDFFG’s IT Department to assess the optimal approach for technical knowledge transfer?**

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We are unable to release the organizational structure for IT publicly for security reasons, however we can confirm designated support will be available.

Date: May 1, 2023

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Signature of Proponent

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Name of Proponent

Inquiries relating to this RFP may be directed to:



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## **APPENDIX A**

### **RDFFG Classification and Retention Schedule Sample**



# REGIONAL DISTRICT of Fraser-Fort George

Corporate Records Management Program

## Classification System and Retention Schedule

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### SECTION 01 CORPORATE SERVICES

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#### PRIMARY NUMBERS: 0100 - 0699

Section 01 covers a wide variety of general subjects relating to administrative and managerial services, associations, the meetings and committees of the Board, other committees, conferences, meetings, etc.

See Section 04, "Information Systems and Services", for subjects relating to computer systems, public relations and other information services.

Version Log		
Version	Date	Changes
00	June 26, 2019	Initial Release

Intended Distribution		
	Users	Intended for the users of the CRMP. A separate governing document may be in use by the CRMP Administrators.
	Corporate Records Management Program Administration	Intended to be used by the administrators of the CRMP due to the high-level content which may not be required by the CRMP users.
✓	Users and CRMP Administration	Contains content that is used by both the users and the CRMP Administrators.

### 0110 Administration - General

Includes records relating generally to administrative functions which are not found elsewhere in this section.

#### Legal Citations

B34

#### Related References:

For amalgamation and restructuring, see Primary 01-0115.

For the incorporation and letters patent documents relating to the establishment of the Regional District, see Primary 06-2370.

Code	Title	A	SA	FD
01-0110-01	General	CY+1	6Y	D
01-0110-20	Convenience Files By Area <u>Note:</u> These are convenient copies of correspondence compiled for administrative use only. Classify the official file copy under the appropriate subject	CY+1	6Y	D
01-0110-30	Appointment Books, Calendars, Diaries By Type or Area, Date <u>Note:</u> Diaries relating to specific subjects should be classified under the appropriate subject.	CY+1	6Y	D
01-0110-40	Staff Meetings By Service Area, Topic, Date	CY+1	6Y	D

Abbreviations							
<b>A</b>	Active	<b>CY</b>	Calendar Year	<b>SR</b>	Special Retention	<b>VR</b>	Vital Record
<b>SA</b>	Semi-Active	<b>SO</b>	Superseded or Obsolete	<b>P</b>	Permanent	<b>PIB</b>	Personal Information Bank
<b>FD</b>	Final Disposition	<b>w / m / y</b>	Week / Month / Year	<b>D</b>	Destruction		

## Section 01 – Corporate Services

### 0115 Amalgamation and Restructure

Includes records relating to amalgamation, boundary extensions, restructuring, government service reviews and withdrawal from services. Includes letters patent, order in council, and Organization Charts.

#### Legal Citations

Custom Citation

This does not include service reviews of individual Service Areas.

#### Related References:

For individual service area management reviews, see Primary 01-0600.

For the Incorporation of the Regional District as an organization (Origins), see Primary 06-2370.

Code	Title	A	SA	FD
01-0115-01	General	CY+1	6Y	D
01-0115-02	Incorporation	SO <sup>1</sup>	Nil	P
01-0115-03	Organization Charts	SO <sup>2</sup>	Nil	P
01-0115-20	Amalgamation By Location	SO <sup>1</sup>	Nil	P
01-0115-30	Boundary Extension By Location	SO <sup>1</sup>	Nil	P
01-0115-40	Restructuring By Service Area, Date	SO <sup>1</sup>	Nil	P
01-0115-50	Service Reviews and Equity Reviews By Date	SO <sup>1</sup>	Nil	P

(SO<sup>1</sup> = Until Completed)

(SO<sup>2</sup> = Until updated or changed)

### 0125 Acts and Legislation

Includes records relating to general information on acts and legislation. Includes comparative studies of legislation from various levels of government. Where required, subdivide by jurisdiction.

#### Legal Citations

No identified citations

Note: Regional District employees should utilize Quickscribe for the most up-to-date legislation.

#### Related References:

For Bylaws, see Primary 09-3900.

Code	Title	A	SA	FD
01-0125-01	General	CY+1	6Y	D
01-0125-02	Comparative Studies	SO	Nil	D
01-0125-20	Provincial Legislation Alpha by Name	SO	Nil	D
01-0125-30	Federal Legislation Alpha by Name	SO	Nil	D

(SO = Until updated, replaced, or no longer needed)

Abbreviations							
<b>A</b>	Active	<b>CY</b>	Calendar Year	<b>SR</b>	Special Retention	<b>VR</b>	Vital Record
<b>SA</b>	Semi-Active	<b>SO</b>	Superseded or Obsolete	<b>P</b>	Permanent	<b>PIB</b>	Personal Information Bank
<b>FD</b>	Final Disposition	<b>w / m / y</b>	Week / Month / Year	<b>D</b>	Destruction		



## Section 01 – Corporate Services

### 0220 Appreciation, Complaints, Inquiries

Includes general letters of appreciation, complaint, condolence, congratulation, invitation, criticism, etc.

#### Legal Citations

No identified citations

For complaints regarding a specific issue, file under the specific section where applicable.

Code	Title	A	SA	FD
01-0220-01	General	CY+1	6Y	D
01-0220-20	Appreciation, Complaints, Inquiries <sup>PIB</sup> By Service Area, Subject, and Date; or Subject and Date	CY+1	6Y	D

### 0230 Associations, Clubs and Societies

Includes correspondence, proceedings, minutes, annual reports, financial statements, membership fees, etc. related to associations, clubs, federations, foundations, leagues, orders, societies and similar organizations the Regional District, it's staff, or individual directors may be involved with.

#### Legal Citations

B35, C94

For example, membership to the Local Government Management Association (LGMA), ARMA International, Yellowhead Highway Association, or any other organization which holds events, provides materials, or benefits it's members would fall into this Primary.

For a further breakdown within an individual organization, use the following categories:

- 01 General
- 02 Agendas
- 03 Minutes
- 04 Attendance Lists
- 05 Membership lists and appointments <sup>PIB</sup>
- 06 Reports
- 07 Financial Statements and Budgets
- 08 Newsletters and Bulletins

#### Related References:

For committees and commissions not related to the Board, see Primary 01-0360.

For conferences, seminars, symposia, etc which the Regional District attends but has no contribution to the organization after the event, see Primary 01-0390 (i.e. UNBC Conference on a general subject).

For committee meetings of the Regional District board, see Primary 01-0540.

Code	Title	A	SA	FD
01-0230-01	General	CY+1	6Y	D
01-0230-20	Organization Alpha by Name, Year	CY+1	6Y	D

Abbreviations							
<b>A</b>	Active	<b>CY</b>	Calendar Year	<b>SR</b>	Special Retention	<b>VR</b>	Vital Record
<b>SA</b>	Semi-Active	<b>SO</b>	Superseded or Obsolete	<b>P</b>	Permanent	<b>PIB</b>	Personal Information Bank
<b>FD</b>	Final Disposition	<b>w / m / y</b>	Week / Month / Year	<b>D</b>	Destruction		

## Classification System and Retention Schedule

### Section 01 – Corporate Services

#### 0290 Awards

Includes records relating to the presentation or receipt of awards for the Regional District.

##### Legal Citations

B36

##### Related References:

For Ceremonies and Celebrations hosted by the Regional District, see Primary 01-0330.

For Staff Awards, see Primary 07-2540.

For Special Events, see Primary 15-8100.

Code	Title	A	SA	FD
01-0290-01	General	CY+1	6Y	D
01-0290-20	Civic Awards Individual, by name and date	SO	Nil	P
01-0290-30	Other Awards Individual, by name and date	SO	Nil	P

(SO = Upon Completion of event)

#### 0320 Campaigns and Canvassing

Includes records relating to the United Way, Canada Savings Bonds, blood donor clinics and other drives and campaigns.

##### Legal Citations

No identified citations

Code	Title	A	SA	FD
01-0320-01	General	CY+1	6Y	D
01-0320-20	Campaigns Alpha by Name	CY+1	6Y	D

#### 0330 Ceremonies and Celebration

Includes records relating to special ceremonies, inaugurations, laying of corner stones, dedications, celebrations, etc. hosted by the Regional District.

##### Legal Citations

No identified citations

##### Related References:

For awards the Regional District received, see Primary 01-0290.

For Staff Awards, see Primary 07-2540.

For special events the Regional District was involved with and did not host, see Primary 15-8100.

Code	Title	A	SA	FD
01-0330-01	General	CY+1	6Y	D
01-0330-20	Celebrations Alpha by Name, Date	SO	Nil	P

(SO = Upon completion of the event)

Abbreviations							
<b>A</b>	Active	<b>CY</b>	Calendar Year	<b>SR</b>	Special Retention	<b>VR</b>	Vital Record
<b>SA</b>	Semi-Active	<b>SO</b>	Superseded or Obsolete	<b>P</b>	Permanent	<b>PIB</b>	Personal Information Bank
<b>FD</b>	Final Disposition	<b>w / m / y</b>	Week / Month / Year	<b>D</b>	Destruction		

### 0360 Committees, Commissions and Meetings

Includes records relating to the establishment, organization and functions of boards, commissions, committees, councils, groups, panels, subcommittees, task forces and working groups not shown elsewhere. Includes agenda, notices, minutes, reports and other records.

#### Legal Citations

No identified citations

Examples include the Parcel Tax Roll Review Panel, PG Treaty Advisory Committee, and the Cultural Services Advisory Committee

If required, use the following categories for a further breakdown within an individual committee:

- 01 General
- 02 Agendas
- 03 Minutes
- 04 Attendance Lists
- 05 Membership lists and appointments <sup>PIB</sup>
- 06 Reports
- 07 Financial Statements
- 08 Terms of Reference

#### Related References:

For associations, clubs, societies, etc. the Regional District or its employees are a member of and contribute to the goals of the organization, see Primary 01-0230.

For conferences, seminars, symposia, etc which the Regional District attends but has no contribution to the organization after the event (i.e. UNBC Conference on a general subject), see Primary 01-0390.

For committees of the Regional District that are Board appointed, see Primary 01-0540.

For Board Meetings, see Primaries 01-0550 and 01-0560.

Code	Title	A	SA	FD
01-0360-01	General	CY+1	6Y	D
01-0360-20	Commissions and Committees Alpha by Name, Year	SO	Nil	P

(SO = When the committee is officially disbanded or membership ends)

Abbreviations							
<b>A</b>	Active	<b>CY</b>	Calendar Year	<b>SR</b>	Special Retention	<b>VR</b>	Vital Record
<b>SA</b>	Semi-Active	<b>SO</b>	Superseded or Obsolete	<b>P</b>	Permanent	<b>PIB</b>	Personal Information Bank
<b>FD</b>	Final Disposition	<b>w / m / y</b>	Week / Month / Year	<b>D</b>	Destruction		