



2026

REQUEST FOR PROPOSALS

Proposal Number: RFP-2026IT-C13219

***Development of a Records Management Structure in
SharePoint***

Issue Date: Wednesday, February 4, 2026 **Time:** 04:00 pm (MST)

Closing Date and Time: Wednesday, March 4, 2026 **Time:** 12:00pm (MST)

Prepared By: Roberta Farnell – Director of IT
Phone: (403) 794-2302
Email: farnellr@newellmail.ca



1.0 INTRODUCTION

The County of Newell (“County”) is a rural municipality located in southeastern Alberta. The County of Newell (Alberta) is seeking a qualified Consultant to **implement and operationalize an existing records management structure within SharePoint Online (Microsoft 365)**.

The County has:

- An **approved Records Retention and Disposition Bylaw and Schedule**, and
- A **defined records management structure (classification framework)**

The purpose of this Project is **not to redesign** these foundational elements, but to:

- Configure SharePoint Online and Microsoft Purview to support them,
- Enable consistent application across departments,
- Ensure defensible retention, disposition, discovery, and auditability, and
- Provide governance, training, and operational readiness.

The purpose of this Request for Proposal (RFP) is for interested professional firms, with appropriate qualifications and experience, to prepare and submit a formal response to this request in accordance with the requirements outlined within. Submitted information will be reviewed by the County and evaluated to select a firm to be awarded the required services.

2.0 INVITATION DETAILS

2.1 Closing Date and Time

Proposals will be accepted until 12:00 PM (MST) on Wednesday, March 4, 2026. The clock referenced by the County’s email/receiving system will be used as the time of delivery. Any submissions received after the defined closing time will be rejected.

2.2 Response Registration

All individuals wishing to respond to this RFP must register with the Director of IT for their intent to submit a response. This can be done by emailing the Director of IT, Roberta Fennell and supplying your firms name and primary contact details (position, phone, and email).

2.3 Uploading Your Submission

Proponent’s can upload their submission via the URL below. Proponents are encouraged to request confirmation by contacting the Director of IT. All submissions must be in a single PDF file. No other file types will be accepted. Submissions must follow the outline provided, sequentially, with each section segmented appropriately for ease of review.

Upload URL
EDRMS-SharePoint - RFP Submission



2.4 Primary Contact

Questions or inquiries related to this RFP can be directed to the Director of IT, Roberta Fernell via phone or email.

County of Newell – Director of IT Contact Details:

Name: Roberta Fernell

Phone: (403) 794-2302

Email: fernellr@newellmail.ca

Proponents shall immediately notify the County of any significant errors, conflicts, discrepancies or other deficiencies discovered in this RFP.

2.5 RFP Schedule

The following outlines the County's anticipated schedule for this RFP process. The schedule provided is subject to change at the County's discretion.

Event	Date
Issuance of RFP	February 4 th , 2026
Deadline for Questions and Inquiries	February 18 th , 2026
Response to Questions and Inquiries	February 25 th , 2026
RFP Closing	March 4, 2026
Selection of Successful Proponent	March 18 th , 2026
Project Kickoff Target	March 25 th , 2026
Project Close Target	September 15 th , 2026

3.0 SUBMISSION INFORMATION AND INSTRUCTIONS TO PROPOSERS

3.1 File Format and Upload Location

Upload a single PDF document containing the required information for this RFP, this includes any supporting documentation/information. The upload URL is provided under section “2.0 Invitation Details” in subsection “2.3 Uploading your Submission” in this document.

3.2 Submission Requirements

The following items are required for the submission of your proposal. Submissions must follow the outline provided, sequentially, with each section segmented appropriately for ease of review. All proposals should be in the sequence described below:

1. Cover
2. Cover Letter
3. Table of Contents
4. Submission Form A: Proposal Form (Filled Out)
5. Submission Form B: Proponent Information (Filled Out)
6. Submission Form C: Project Plan and Additional Information (Include any additional supporting design and planning documentation in this section) (Filled Out)



7. Any other additional materials deemed necessary by the submitter
8. Profiles and Experience of Key Team Members for the Project
9. Confirmation of WCB Clearance Letter
10. Confirmation of Liability insurance

3.3 Conflict of Interest

Proponents, in making the submission, shall have no pecuniary interest in the business of any third party that would cause, or seem to cause, a conflict of interest in carrying out any consulting services for the County related to this project. Should such an interest be acquired during the RFP process, the Consultant shall immediately declare it to the County. The County will, immediately upon notification, take action as deemed appropriate. This may include rejection of the submission.

3.4 Addenda

Should questions or inquiries lead to the need to modify or clarify any portion of the RFP documents, the modifications or clarifications will be issued in writing to all interested Proponents by addenda. The County, its agents and employees shall not be held responsible for any information given by way of verbal or oral communication. Any addenda issued prior to the closing date and time will form part of the RFP documents.

All addenda will be issued and made available via the Alberta Purchasing Connection (APC) website.

3.5 Discretion, Rejection and Cancellation

The selection of a Proponent for this project will be at the sole discretion of the County as appropriate. The County shall not be obligated to accept submissions that are unsigned, incomplete, conditional, illegal, or that contain irregularities of any kind, or if the Proponent fails to meet all of the submission requirements as stated in this RFP. The County reserves the right to deny selection to any Proponent whose credentials or performance has been deemed unsatisfactory to them in the past. Selection can be withdrawn at any time due to changes in personnel of the proposed Proponent's team without prior agreement with the County. The County reserves the right to cancel this RFP process at any time, or waive any irregularities, if it chooses not to proceed any further with this project for whatever reason.

3.6 Submission Costs

All costs and expenses incurred by the Proponent in the preparation and submission of their response to this RFP are the responsibility of the Proponent. The County is not responsible for these costs, or any liability incurred by the Proponent in responding to this RFP.

3.7 Confidentiality

All documents submitted to the County will be subject to the protection and disclosure provisions of the [Access to Information Act \(ATIA\)](#) (for access to records) and the [Protection of Privacy Act \(POPA\)](#) (for privacy rights) of Alberta.

3.8 Amendment or Withdrawal of Proposals

The proponent may amend or withdraw their proposal prior to the closing date and time by submitting a clear and detailed written notice to the primary contact. All proposals become irrevocable after the closing date and time.



3.9 Negotiations

Proponents are advised that the County may negotiate terms, conditions, or alterations to the services specified directly with the successful firm.

3.10 Acceptance of Proposal

Upon acceptance, the proponent agrees to the supply of services as specified in this RFP immediately upon Notice of Award to the successful proponent, or as agreed between the County and proponent.

3.11 Binding Agreement

All proposals shall be final and binding on the proponent for a period of sixty (60) days from the closing date and time and may not be altered by any subsequent offerings, discussions, or commitments unless the proponent is requested to do so by the County. Termination of services may be initiated by the County or the proponent for just cause at any time. A written notification of sixty (60) days is required for termination of services.

4.0 EVALUATION

4.1 Mandatory Requirements

All submissions shall be checked against the “3.2 Submission Requirements”. All submissions shall meet 100% of the mandatory requirements to ensure further evaluation and advancement in the RFP process. Those submissions that do not meet all the “Submission Requirements” will be disqualified. It will be at the County’s sole discretion to determine if a submission shall be disqualified due to insufficient or incomplete information.

4.2 Evaluation Criteria

Submissions meeting the “3.2 Submission Requirements” will be evaluated using a weighted evaluation scoring method as outlined below:

Category	Weight	Description
Proposed Solution	30	Proposals will be evaluated on how the solution meets the requirements defined in the scope.
Project Management/Approach	20	Proponent’s approach is presented in a clear and organized manner that meets the scope and defined objectives of the project.
Project Team Technical Expertise and Availability	20	Evaluated on proposed staff technical expertise and experience as well as the availability to complete the proposed project in a timely manner.
Project Cost	30	The total cost of the project and/or its ability to keep within current budget

4.3 Interview

The County may elect to interview a short list of Proponents to address any questions or clarifications that are required. Proponents shall be responsible for all costs and expenses related to preparing for, and attending, the interview should one be required. The County is not responsible for these costs, or any liability incurred by the Proponents in responding to the RFP.



5.0 SCOPE OF WORK

The Proponent will work with County stakeholders to design and implement a **records management structure in SharePoint**, aligned to County operational needs and Alberta municipal recordkeeping expectations (including defensible retention/disposition).

5.1 Platform and Environment

The implementation shall be completed within the County's **SharePoint Online (Microsoft 365) tenant**, including, but not limited to integration with:

- SharePoint Online
- Microsoft Teams (as applicable)
- Microsoft Purview (Retention & Records Management)

No on-premises SharePoint components are in scope.

5.2 Functions in Scope

The Project shall include the following County functions:

- Legislative
- Administration
- Agriculture Services
 - Facilities
- Corporate Services
 - Finance
 - Payroll
 - Benefits
 - Tax and Assessment
 - Corporate Safety
 - Human Resources
- Information & Technology Services
 - Geographic Information System (GIS)
 - Communications
- Municipal Services



- Enforcement
- Fleet Services
- Roads, Streets, Walks, Lighting
- Airports
- Water
- Wastewater
- Waste Management
- Planning & Development
- Fire & Emergency Services
- Community Services
 - Recreation
 - Minibus
 - Parks & Programs
 - Economic Development

Each function may have unique security, retention, and access requirements that must be respected within a standardized governance model.

5.3 Key Deliverables

The Consultant shall:

- Work with County staff to ensure readiness prior to the commencement of the project
- Create a SharePoint and information architecture built using best practices, such as but not limited to:
 - using hub sites rather than subsites
 - metadata fields and naming conventions
 - security and permission model aligned to departmental and legislative requirements
 - libraries, with permissions set at the library level rather than at the folder or file level
 - site branding
- SharePoint architecture structured for flexibility to accommodate changes that may occur due to future organizational restructuring
- Content types aligned to existing record classes



- Distinction between transitory content, working documents, official records
- In-place records management
- Department site templates
- Working with County staff to ensure that all relevant SharePoint and related platform policies are considered and set to the best interests of the County, such as controls for site creation, site size limitation, and access controls
- Solution must also provide a site for public document access
- Configured for time-based retention, event-based retention, and record declaration rules (automatic or manual)
- Disposition workflows
- Audit logging and reporting
- Knowledge transfer
- Recommend any other deliverables that would best serve the County objectives



6. SUBMISSION FORM: PROPOSAL

RFP Number: **RFP-2026IT-C13219**

RFP Title: **Development of a Records Management Structure in SharePoint**

We,

(Company)

of

(Business Address)

having examined the RFP Documents as issued by the County of Newell (the “COUNTY”); hereby offer to enter into a Contract to perform the Work required by the RFP Documents for the following pricing:

6.1 Proposed Solution Cost

Complete the “Price Offered” column in the table below in regard to your proposed solution.

Table A1 – Proposed Solution Cost

Item #	Description	Price Offered (CDN)
1	Discovery & Current State	\$
2	Solution Configuration & Build	\$
3	Testing & Compliance Validation	\$
4	Training, Change Management & Go-Live	\$
5	Disbursement Fees or Admin Fees (undisclosed fees)	\$
	Sub Total	\$
	GST	\$
	TOTAL LUMP SUM CONTRACT PRICE	\$



6.2 Proposed Solution Cost – Break Down

Provide a detailed line item break down of the components of your proposed solution.

Table A2 – Proposed Solution Detailed Cost

Quantity	Item	Price Offered (CDN)
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

Note: Please add any addition rows you may require.

6.3 Optional Equipment/Services

In the table provided below, Proponents are requested to include any optional pricing for equipment or services not listed in the requirements that may be of value to the County. Optional equipment should be clearly labelled “OPTIONAL” in the proposal. The County reserves the right of including or excluding the scope of work as described and detailed below in any resulting contract. The County reserves the right to award in whole, in part, or not any of the following scope listed below. All Unit pricing to include freight and delivery.

Table A3 – Optional Pricing

Item #	Description/Specifications	Unit of Measure	Unit Price (CDN)
1	Large-scale file share migration and content cleanup		\$
2	Digitization/scanning workflow integration		\$
3	ATIA request/search playbooks and eDiscovery alignment		\$
4	Ongoing managed services (records admin, site governance, enhancements)		\$
5			\$

Note: Please add any addition rows you may require.



6.4 Warranty, Support, and Licensing After Initial Year

In the space provided below, Proponents are requested to include the costs associated with the proposed solution in its entirety for the required warranty, support, and licensing for year two (2), three (3), four (4) and five (5). The initial year (1) of warranty, support, and licensing should be included in (Table A1 – Proposed Solution Cost) as well as (Table A2 – Proposed Solution Detailed Cost). Do not include any costs related to optional items listed in (Table A3 – Optional Pricing).

Table A4 – Additional Year(s) Support and Licensing Costs After Initial 1 Year Term

Item #	Description	Year/Term	Unit Price (CDN)
1		Year 2	\$
2		Year 3	\$
3		Year 4	\$
4		Year 5	\$

Note: Please add any addition rows you may require.

6.5 Proposed Schedule of Work

Provide your proposed start and completion dates for this project.

Table A5 – Proposed Schedule of Work

Item	Description/Phase	Start Date	Completion Date
1	Phase 1 – Validation & Readiness		
2	Phase 2 – SharePoint & Information Architecture Configuration		
3	Phase 3 – Retention & Records Management Configuration		
4	Phase 4 – Departmental Implementation & Pilot		
5	Phase 5 – Training, Governance & Transition		



7.0 SUBMISSION FORM B: PROPOSER INFORMATION

7.1 Organizational Structure/Background

Provide the required information below regarding your organization:

Table B1 – Organizational Structure/Background

Item	Response
Number of years your firm has been operating:	
Number of employees:	
Office Location (Address)	
Main Contact for this proposal (Name, Position, Phone, Email):	

7.2 Organizational Health and Safety Practices

Provide an outline of the safety policies, practices, and procedures that your firm has in place relevant to the scope of work.



7.3 Minimum Insurance Requirements

The County requires all contractors to hold the following insurance requirements, please indicate in the table below where your firm stands with these requirements:

Table B2 – WCB/Insurance Requirements

Item	Yes	No
Does your firm hold a valid WCB clearance letter and is currently in good standing with WCB?		
Does your firm have a minimum of \$2,000,000.00 liability insurance?		

Note: Proof of these requirements will need to be provided prior to project commencement from the successful proponent.

7.4 Project Team

Provide a list of project team members being proposed for this project.

Table B3 – Project Team

Team Member Name	Role	Description

Note: Please add any addition rows you may require.

7.5 Previous Relevant Experience

Provide examples of previous work similar in nature. Refer to specific projects, timelines and budgets.

Table B4 – Previous Relevant Experience

Project	Description

Note: Please add any addition rows you may require.



7.6 Customer References

Provide contact details for a minimum of three (3) previous Customers, for whom similar services have been provided within the last five (5) years. Additional references up to a maximum of five (5) can be provided at the discretion of the Proponent.

Table B5 - Customer References

#	Customer Company	Contact Name	Contact Position	Phone Number	Description of Project/Work Completed
1					
2					
3					
4					
5					

At the discretion of the County, the Customer references may be contacted to enquire about past performance with regard to project management, responsiveness, technical capability, quality of deliverables and post commissioning support.



8.0 SUBMISSION FORM C: PROJECT PLAN AND ADDITIONAL INFORMATION

8.1 Detailed Project Plan and Implementation Process

Proponents shall provide detailed plans for implementation and execution of the proposed project. Timelines, deliverables, philosophies, internal and external engagement, testing scenarios, fall back plans, and any other pertinent information shall be provided in the space below or attached if clearly marked as 8.0 Submission Form C: Project Plan and Additional Information and noting that it has been attached in the box below.

8.2 Training and Documentation

Provide a summary of the training plan for County staff for the systems implemented by your firm.



8.3 Efficiency and Innovation

Provide examples of recommendations for making County operations more efficient and streamlined in relation to this project. This section could focus on any number of scenarios from recommended software implementation, to processes and procedures for carrying out daily business. The County is very technologically driven, and it is a belief that where electronic systems can perform tasks they should. Previous experience and success stories are welcome inclusions.