

BC Housing Management Commission

RFTQ 1070-0708/515

Enterprise Document & Records Management System

Information Meeting

February 14, 2008



BC Housing

Introductions

- Roundtable Introductions: Name, Title, Company
- Question Etiquette: Name, Company, Question
 - Please hold all questions until the end of the presentation.



Information Meeting Agenda

- BC Housing Organization
- Background
- Overview of Business Systems
- EDRMS Project Goals
- RFTQ - Scope
- Project Mandates
- Approach
- Estimated Project Timeline
- RFTQ Evaluation Team
- RFTQ Highlights
- Questions & Answers
- Final Comments



BC Housing Organization

- Provincial crown agency
- Develops, manages and administers wide range of subsidized housing options for the Province
- 5 regional offices, 1 area office and a head office; employs approx. 500 staff
- Manages 7,800 public housing units
- Administers subsidy agreements for over 720 housing providers that supply approx. 59,500 housing units
- Works with non-profit organizations to operate 1,300 emergency homeless shelter beds and provide homeless and Aboriginal outreach programs
- Provide rent supplements to 2,500 low-income working families and 15,000 seniors



Background

- BC Housing is mandated by provincial legislation to maintain all hardcopy & electronic files & documents (including email) as specified by ARCS/ORCS classifications.
- Hardcopy records currently managed by QRMS software.
 - BC Housing maintains thousands of hardcopy documents/files.
 - Represents only a small subset of all documents created & stored by BCH employees when electronic documents & files are included.
- Electronic document storage mix of network folders & personal hard drives.
 - Lack of control & standards.

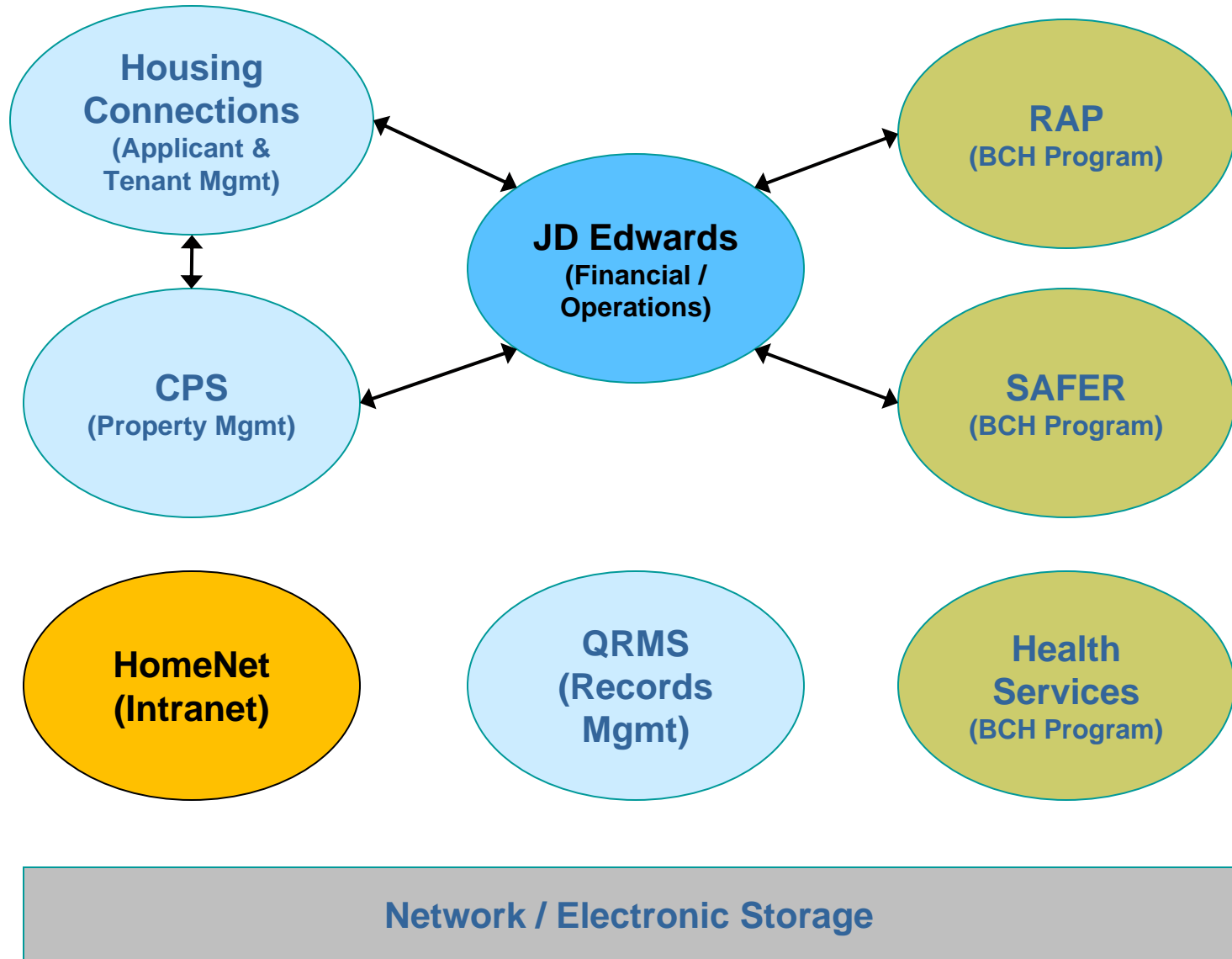


Background cont'd

- Records also contained within various enterprise system (i.e. JD Edwards, CPS, Housing Connections, etc.).
- Email managed by each individual user.
- Corporate website content contained in offsite CMS.
- No content management for internal Intranet.
- Most templated documents & forms stored in network folder accessible by Word users.
 - Lack of control, standards, & quality.
 - Limited online forms.



Overview of Systems



EDRMS Project Goals

Find an EDRMS solution that would:

- Replace the existing QRMS software for record management.
- Introduce document, email, form, and web content management into the organisation.
- Integrate with JD Edwards;
- Integrate with Housing Connections;
- Integrate with CPS;
- Streamline & develop workflows for business processes that involve records or documents; and,
- Ensure compliance with agency & government legislation.



RFTQ Scope

- Document Search
 - Central repository where all documents are stored and indexed.
 - 'Global' enterprise search engine for the document repository, network, and intranet.
- Document Sharing
 - Workflows where documents can be shared between users for purposes of review, editing, approval, and information exchange.
 - Document version control.
- Email Management
 - Archive, retention, & search



RFTQ Scope cont'd

- Document Authoring
 - Templated documents
 - Standards
- Workflow
 - Document management
 - Classification & archival
 - Integration with other systems
- Web content management
 - For future intranet & internet applications
- Records management
- Forms management
 - Online & offline
- Scanning



Project Mandates

- Minimal or no core modifications
- Adopt best practices, where appropriate
 - Move towards efficiency driven processes
 - Look for better ways of accomplishing the business goal



Approach

Phase 1 – Evaluate and Select Packaged Software Solution.

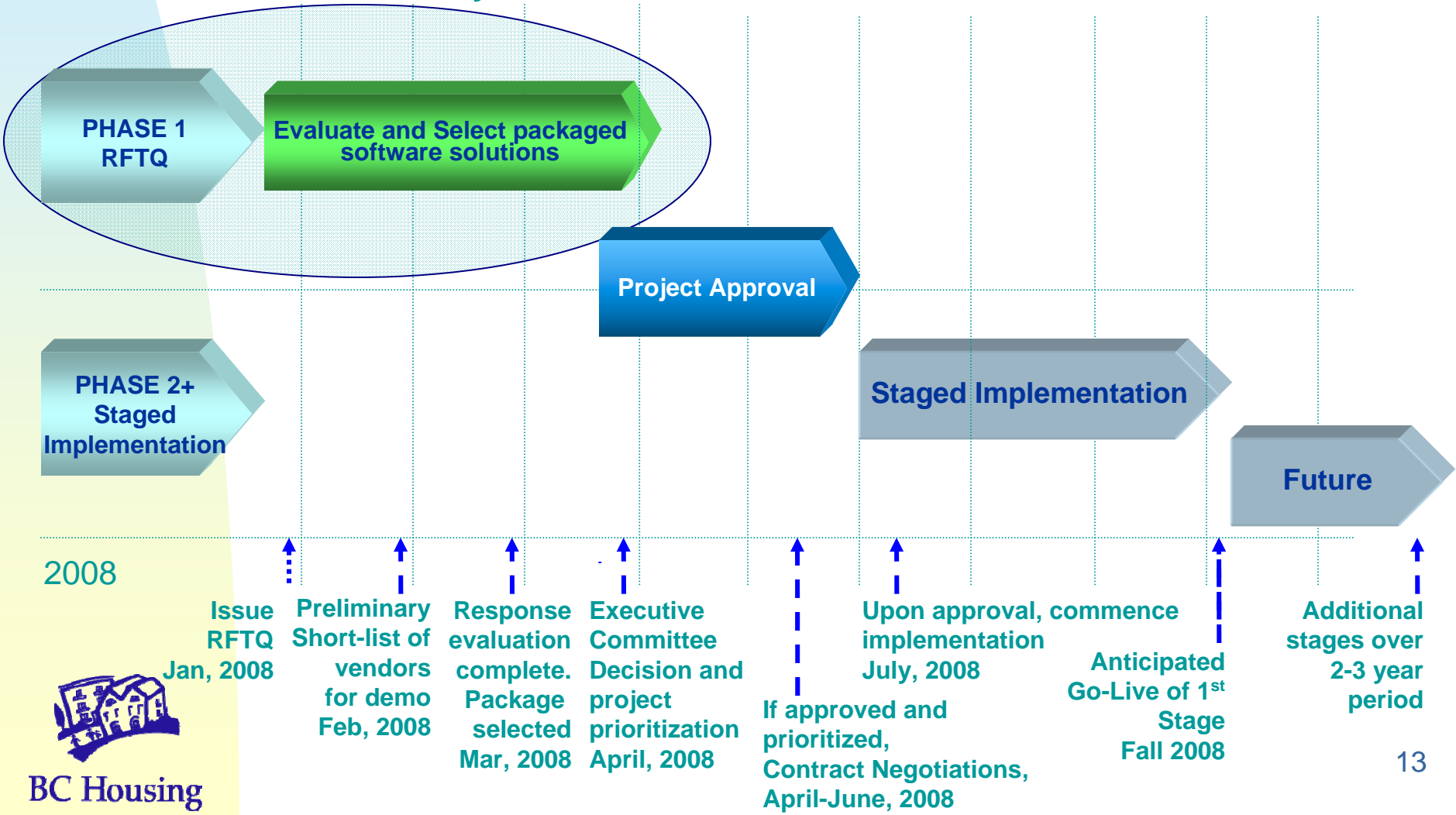
Phase 2 – Gain Executive Approval and Implement Software Solution

- Staged implementation
 - By process, department and/or functionality



Estimated Project Timeline

Where we are today



RFTQ EVALUATION TEAM

Will be made up of representation from the following business areas:

- Business Support Services
 - Records & Information Centre
- Corporate Communications
- Information Technology



RFTQ - Highlights

- Submission date – **Monday, March 3, 2008, 2:00PM**
- Business Process Overview (Part B, Section 5)
 - Details of current business “processes” related to document & records management
 - Provided to assist vendor in understanding scope of business function
 - Future opportunities identified for each business process (future vision)
 - BC Housing will re-engineer as much as possible to fit product



RFTQ - Highlights (cont.)

- Detailed Functional Requirements (Appendix B)
 - Priorities:
 - M = Must Have
 - S = Should Have
 - C = Could Have
 - MF = Must Have Now, will implement in future
 - F = Future
 - Valid alternatives based on best practices will be accepted for any priority
 - **If software is licensed by module, please ensure the appropriate module is identified with each business requirement**



RFTQ - Highlights (cont.)

- Detailed Functional Requirements (Appendix B) cont'd
 - DO NOT alter the formatting of the document:
 - Except row height
 - Vendor responses of more than a few paragraphs can be cross-referenced and submitted on a separate document
 - Wherever possible use the requirements document for comments or responses
 - Provide electronic as well as printed copy with your submission
 - When stating compliance with specific requirements, please also qualify your answer with some background information, as provided in the matrix.



QUESTIONS & ANSWERS



BC Housing

Final Comments

- Questions from this session and future questions will be incorporated into addendum(s) to the RFTQ and distributed to those who returned Receipt Confirmation Forms on time (Feb 8th).
- Only those respondents who submitted Receipt Confirmation Forms on time will have their response considered.
- Questions received after February 22, 2008 4:00 pm, will not be addressed.
- Responses to the RFI must be submitted by:
 - **2:00 pm (local time) March 3, 2008**
- Demo Target: Mar 10 - 21,2008
 - Demo scripts will be sent to short listed vendors to provide structure for demo.

