Request for Proposals (RFP)
Digital Information Management and SharePoint Optimization

Issue Date: May 8, 2026 | Submission Deadline: May 29, 2026

1. Background

Equiforce is a pan-provincial organization based in Newfoundland and Labrador, with a primarily remote team.

Over the past year, the organization has undergone significant transformation, including governance modernization, strategic realignment, and operational improvements. As part of this evolution, Equiforce is prioritizing the modernization of its digital information management systems to better support collaboration, reduce operational risk, and ensure consistency across a distributed workforce.

As a nearly 30-year-old organization, current digital file structures and practices have developed organically over time. This has resulted in inconsistencies in file organization, permissions, and workflows, creating inefficiencies and increasing the risk of information loss or inaccessibility.

This RFP seeks to engage an external provider to assess, redesign, and implement a modern, practical, and sustainable digital information management system. While SharePoint optimization is anticipated, proponents may recommend alternative platforms where appropriate.

2. Objective

The objective of this engagement is to:

- Assess current digital file systems, workflows, and permissions
- Identify risks, inefficiencies, and opportunities for improvement
- Design and implement an updated digital information management structure
- Establish clear, usable governance practices and standards
- Ensure the resulting system is intuitive, scalable, and manageable by internal staff

3. Scope of Work

Phase 1: Discovery and Assessment

- Review the current SharePoint environment, including structure, architecture, and storage
- Conduct consultations with staff to understand workflows, usage patterns, and pain points
- Evaluate permissions and access controls, including current group structures and inconsistencies

- Identify security risks, duplication, outdated content, and archival opportunities

Phase 2: Assessment and Recommendations

- Develop a comprehensive assessment of the current system, including key issues, risks, and inefficiencies
- Provide clear, practical recommendations to address identified challenges
- As part of this assessment, include a targeted comparison of viable platform approaches, which may include:
    - Optimizing the existing SharePoint environment
    - Migrating to an alternative platform if appropriate
- This comparison must be integrated into the assessment and include:
    - High-level cost implications, including implementation and ongoing costs
    - Operational impact on staff workflows and day-to-day use
    - Level of effort and risks associated with any migration
    - Internal capacity required to manage the system post-implementation
    - Clear rationale for the recommended approach

The intent is to support a practical, informed decision rather than a theoretical or overly technical analysis.

Phase 3: Design and Implementation

- Design an updated digital filing structure aligned with organizational needs and workflows
- Implement:
    - Updated folder and/or site architecture
    - A clear, role-based permissions model
    - Archival strategy and cleanup of legacy content
- Ensure the system is structured for ease of ongoing management and future updates by internal staff

Phase 4: Governance and SOP Development

- Develop a Digital File Governance Guide that is practical, clear, and usable by staff, including Standard Operating Procedures (SOPs).

At minimum, this must include:

- Naming conventions for files and folders
- Standardized folder structure guidelines
- Permissions framework, including:
    - Defined roles and access levels
    - Guidance on when to use unique versus inherited permissions
- Step-by-step procedures for:
    - Adding and removing users
    - Creating new folders or sites
    - Assigning and modifying permissions
- Archival practices, including:
    - When and how to archive content
    - How to handle outdated or duplicate files
- Clear guidance to support consistency across teams and over time

The guide must be written in plain language and designed for ongoing internal use without reliance on external support.

Phase 5: Training and Transition Support

- Deliver staff training sessions, live and/or recorded
- Provide practical support during implementation and transition
- Conduct follow-up check-ins to address issues and support adoption

Phase 6: Post-Implementation Support

- Provide a bank of 20 to 40 hours for:
    - Troubleshooting
    - Minor updates
    - Adjustments based on real-world use

4. Deliverables

The selected proponent will be expected to deliver:

- Assessment Report, including:
    - Current-state analysis
    - Identified risks and inefficiencies
    - Integrated platform comparison, including cost and operational considerations
    - Clear, justified recommendations
- Implemented digital filing structure
- Digital File Governance Guide
- Training sessions and supporting materials
- Final Report, including:
    - Summary of changes implemented
    - Final structure and permissions model
    - Approved governance practices

5. Timeline

The organization has not prescribed a fixed project timeline for this work. Proponents are expected to recommend an appropriate phased approach and estimated timeframe for completion based on their assessment of the scope, methodology, and level of effort required.

6. Proponent Qualifications

Proponents should demonstrate:

- Experience with SharePoint and/or Microsoft 365 environments
- Expertise in digital information governance and file system design
- Experience working with small or distributed teams is preferred
- Ability to both advise and implement solutions
- Experience delivering training and developing practical SOPs

7. Proposal Requirements

Proposals should include:

- Proposed approach and methodology
- Relevant experience and examples of similar work

- Project team and roles
- Proposed timeline
- Cost breakdown, including:
    - Fixed project costs associated with the proposed scope of work and implementation
    - Any anticipated ongoing, licensing, subscription, or optional costs
    - Hourly rates for additional support or out-of-scope work, if applicable
    - Identification of any assumptions, exclusions, or variables that may impact pricing

Proponents are encouraged to provide pricing that is clear, practical, and aligned with the scale and operational context of the organization.

8. Evaluation Criteria

Proposals will be evaluated based on:

- Experience and expertise relevant to the scope of work – 30%
- Proposed approach, methodology, timeline, and understanding of organizational needs – 30%
- Practicality, usability, and long-term sustainability of the proposed solution – 20%
- Cost-effectiveness and overall value – 10%
- Proposal quality, clarity, and completeness, including adherence to the RFP requirements– 10%

9. Additional Considerations

- Solutions must be practical, intuitive, and manageable by internal staff without ongoing reliance on external consultants
- Recommendations should prioritize cost-effectiveness, scalability, and long-term sustainability
- Solutions that introduce unnecessary complexity or require specialized ongoing administration may be scored lower
- Proposals that do not demonstrate the ability to clearly assess cost and operational implications may be considered non-responsive

10. Submission Guidelines

- Proposals must be submitted electronically in PDF format via email to opportunities@equiforce.ca no later than **4:00 p.m. NST on May 29, 2026.**
- Submissions should be concise and focused, and should not exceed ten (10) pages, excluding any supporting materials included as appendices.
- Questions regarding this RFP may be directed to opportunities@equiforce.ca no later than 48 hours before the submission deadline.
- Equiforce will not be responding to inquiries regarding budget, as this RFP is intended to solicit proposed approaches, timelines, and pricing from proponents.
- Equiforce is seeking practical, right-sized solutions appropriate for a small-to-medium-sized organization operating in a primarily remote environment.
- Equiforce reserves the right to reject any or all proposals, to negotiate with the selected proponent, and to cancel this RFP at any time.
- Late submissions may not be considered.