



## **REQUEST FOR INFORMATION**

### **DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES (PC854)**

**Issue Date: October 7, 2015**

**Responses Due: November 13, 2015 @ 2PM PST**

**Issued by:**

**Housing Authority of the County of San Bernardino  
715 E. Brier Drive  
San Bernardino, CA 92408**



**REQUEST FOR INFORMATION**

**DISASTER RECOVERY SERVICES  
PC854**

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EXHIBITS:

- A. DEPARTMENT INFORMATION AND ORGANIZATIONAL CHART (ATTACHED AS SEPARATE DOCUMENT)
- B. EXISTING EMERGENCY PLAN (ATTACHED AS SEPARATE DOCUMENT)
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- C. CONTACT INFORMATION
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- E. HUD FORM 5369 B OR C (ATTACHED AS SEPARATE DOCUMENT)

## REQUEST FOR INFORMATION

### **HOUSING AUTHORITY OF THE COUNTY OF SAN BERNARDINO DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES – RFI#PC854**

#### **I. INTRODUCTION**

The Housing Authority of the County of San Bernardino (HACSB) is one of the nation's most progressive and proactive housing authorities and the largest provider of affordable housing in the County. HACSB owns 2,514 affordable housing units located throughout the County of San Bernardino. We proudly serve in excess of 30,000 people, most of whom are seniors, disabled individuals, and children.

In 2008, the agency embarked on an agency wide strategic planning process with the following objectives: help clients achieve economic independence, ensure freedom of housing choice, and save tax payer dollars through efficient work. This has allowed us to enhance our work around our mission and service philosophy. Ultimately, our Mission of empowering all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County is our top priority.

As we see the demand for affordable housing increase, the limited affordable housing supply we currently have available is not enough to house the thousands of families in need. As a developer of sustainable affordable and market rate housing, over the years we have expanded our housing stock in an attempt to meet the county's growing needs. Working diligently to acquire, build, and renovate properties, we incorporate the concept of mixed income communities, build utilizing green technology, and provide recreational and educational facilities for everyone's use.

Additionally, we are here as a stepping stone for families who need help building a foundation for a brighter future. Therefore, aside from providing housing, we assist our customers with ways of becoming economically independent. In collaboration with our partners, we provide: family/individual case management and counseling; career training and job placement; program integrity; homeownership assistance; college scholarships, to name a few.

We value our vendors and contractors as partners in our mission to empower all individuals and families in need to achieve an enriched quality of life by providing housing opportunities and resources throughout San Bernardino County.

**II. PURPOSE**

The purpose of this Request for Information (RFI) is to solicit responses for budgetary purposes for the upcoming fiscal year from qualified companies to help define a scope of work for DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES, as identified in the “Scope of Work” which is included with this request.

**III. BOARD**

The powers of the HACSB are vested in its Board of Governors with specified authorization delegated to the Housing Commission. The County of San Bernardino Board of Supervisors acts in the capacity of HACSB Board of Governors and has the final approval for all actions related to the acquisition of supplies and services.

**IV. ADMINISTRATIVE PERSONNEL**

Daniel Nackerman is the Executive Director of the HACSB.

**V. SCOPE OF SERVICES**

Respondents will be requested to help define a scope of work for Disaster Recovery and Business Continuity/Emergency Planning Consulting Services as outlined in the Statement of Work – Exhibit A.

**VI. RFI INSTRUCTIONS**

**a. Contact Information**

This RFI is being issued, as will any addenda by the HACSB. The contact person for the HACSB is:

Angie Lardapide, Procurement and Contracts Department  
715 E. Brier Drive  
San Bernardino, CA 92408-2841  
(909) 890-0644 ext. 6340

**b. RFI Submission and Format**

By this Request for Information, the HACSB solicits responses to be received **by 2PM PST on November 13, 2015** in the form outlined below. **Late submittals will not be accepted.**

1. Responses may be submitted by mail or hand-delivered which should include one (1) signed copy to the following:

Housing Authority of the County of San Bernardino  
Procurement & Contracts Department  
Attn: Angie Lardapide  
715 E. Brier Dr.  
San Bernardino, CA 92408-2841

The envelope **must be sealed** and include the following notation on the bottom left hand corner, **“Request of Information PC#854 Disaster Recovery Services”**. Please also include company/individual name on the outside of the envelope.

If you have questions regarding this request, you must submit them via email to [alardapide@hacsb.com](mailto:alardapide@hacsb.com) no later than **2PM PST on Monday, October 26, 2015**.

Responses to all appropriately submitted questions will be posted on the HACSB website (<http://ww2.hacsb.com/business>) on or before **Monday, November 2, 2015**.

Facsimile Copies or emails will NOT be accepted. All responses will become property of the HACSB upon submission.

**c. RFI Terms and Conditions**

This RFI does not commit HACSB to prepare and disseminate a Request for Proposal. The RFI is intended to be used to prepare a scope of work for DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES.

The HACSB reserves the right to select more than one respondent, to select a respondent(s) for specific purposes or for any combination of specific purposes, and to defer the selection of any respondent(s) to a time of the HACSB's choosing.

**d. Board and Staff Communications**

Under no circumstances may any member of the HACSB or any staff member other than the contact specified in Section VI. a. above be contacted during this RFI process by any entity intending to submit a response to this RFI. Failure to comply with this request will result in disqualification. All questions should be in writing and directed to the individuals identified in Section VI. a above.

**e. Timetable**

<u>Event</u>	<u>Date</u>
Request for Information Released	October 7, 2015
Informational Conference	October 19, 2015 @ 10AM PST
Due Date for Questions	October 26, 2015 @ 2PM PST
Posting of Responses for Questions	November 2, 2015
Responses Due	November 13, 2015 @ 2PM PST

If you have questions regarding this response, you must submit them in writing to [alardapide@hacsb.com](mailto:alardapide@hacsb.com) no later than **2PM PST on October 26, 2015**.

Responses to all appropriately submitted questions will be posted on the HACSB's website (<http://ww2.hacsb.com/business>) on or before **November 2, 2015**.

**The deadline for submissions in response to this Request for Information is 2PM PST on November 13, 2015.** Telephone or fax responses will not be accepted for this request.

**f. Release of Information**

Information submitted in response to this RFI will not be released by the HACSB during the RFI review process or prior to a potential formal RFP and subsequent contract award.

**g. Proprietary Information**

If a respondent does not desire certain proprietary information in their response disclosed, the respondent is required to identify all propriety information in the response, which identification shall be submitted concurrently with the response. If the respondent fails to identify proprietary information, it agrees by submission of its response that those sections shall be deemed nonproprietary and may be made available upon public request after a potential RFP and subsequent contract award.

**h. HACSB Reserves the Right to:**

1. Reject any and all responses and waive any irregularities.

## VII. RFI QUESTIONS FOR PROVIDERS

### a. **Organizational and Personnel Background**

Provide an overview of your company, emphasizing its qualifications and major organizational strengths.

### b. **Experience**

Discuss your experience, in serving as a provider of DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES.

### c. **Miscellaneous Discussion Question**

1. Identify the specific individual(s) who would be assigned to work with the HACSB and specify which person would be the primary contact person with the HACSB.

### d. **Estimated Pricing Range**

Provide an estimated range of cost (per the Response Form – Exhibit D) which is included with this “Request for Information”, and clearly specify if any additional expenses will be charged to the HACSB in connection with this response. The pricing range is to assist us in determining the options selected for inclusion in the request for proposal that will be developed based on the response to this RFI.

### e. **Affirmative Action**

The HACSB requires that each respondent be an Equal Opportunity Employer: State that the respondent complies fully with all government regulations regarding nondiscriminatory employment practices.

## VIII. COMPANY QUALIFICATIONS

Responses shall be considered from responsible vendors who are engaged in the business of providing DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES. Responses must include information on competency in providing these materials and supplies, demonstration of acceptable financial resources, and personnel staffing. The vendor shall furnish detailed information on references, as well as background and experience with projects of a similar type and scope to include as a minimum:

- a. Brief history of company
- b. A listing of five (5) references where similar services have been provided. The client reference shall include the name of organization, contact person, address, and telephone numbers.
- c. Vendor shall describe their understanding of the project scope, and their proposed approach to provide the services identified. Provide feedback and recommendations on two options:
  - Create a complete new Disaster Recovery and Business Continuity/ Emergency Plan or
  - Review Existing Disaster Recovery Plan and add Business Continuity based on the following Exhibits (as attachments to the RFI):
    1. Exhibit A – HACSB Department Information and Organizational Chart
    2. Exhibit B – Existing Emergency Plan
      - Attachment 1: Back Up Schedule
    3. Exhibit C – Contact Information Form
    4. Exhibit D – Pricing for both options
    5. Exhibit E - HUD forms 5369 B or C

## **IX. INFORMATIONAL CONFERENCE**

HACSB would like to hold an informational conference for this RFI on **Monday, October 19, 2015 at 10:00AM PST** at the HACSB Administration Office, 715 E. Brier Drive, San Bernardino, CA 92408.

You may participate in person, or via conference call. If you choose to participate by conference call, you must send an e-mail to [alardapide@hacsb.com](mailto:alardapide@hacsb.com) not later than 5 pm on Tuesday, October 13, 2015. You will receive a call in number and further instruction prior to the morning of the call.

We would recommended that you participate in the informational conference either in person or via conference call to get clarification of the objectives and goals of the RFI and to be able to pose questions and provide suggestions.

Information gathered from this RFI will be compiled into a formal Request for Proposal. This proposal will be issued at a future, yet to be determined date. You will receive a notification when the RFP has been released, so that you may participate in that solicitation.



## **X. RFI REQUIREMENTS AND CONDITIONS**

### **Minimum Requirements**

This RFI sets forth the minimum requirements that all submissions shall meet. Failure to submit Responses in accordance with this request may render the response unacceptable.

### **Cost of the Response**

Costs incurred by any respondents in the preparation of its response to the RFI are the responsibility of the respondents and will not be reimbursed by the HACSB. Respondents shall not include any such expenses as part of their responses.

### **Clarification to Responses**

The HACSB reserves the right to obtain clarifications of any point in a company's response or to obtain additional information necessary to properly evaluate a particular response. Failure of respondents to respond to such a request for additional information or clarification could result in rejection of the company's response or responses.

### **Cancellation of the RFI**

The HACSB reserves the right to cancel this RFI at any time, for any reason, and without liability if cancellation is deemed to be in the best interest of the HACSB. The respondent assumes the sole risk and responsibility for all expenses connected with the preparation of its response.

### **Collusion**

Respondents, by submitting a response, hereby certifies that no officer, agent, or employee of the HACSB has a pecuniary interest in this response; that the response is made in good faith without fraud, collusion, or connection of any kind with any other respondents; and that the respondents is competing solely in its own behalf without connection with, or obligation to any undisclosed person or company.

### **Contacts**

All questions concerning the RFI shall be directed to **Angie Lardapide** whose contact information is provided above. To avoid all appearances of impropriety, proposer should only contact the above referenced staff person and should not attempt to contact any HACSB Governor, Commissioner, or the Executive Director. No oral request for clarification or information will be accepted. All such requests must be submitted to Angie Lardapide at [alardapide@hacsb.com](mailto:alardapide@hacsb.com) no later than **2PM PST on October 26, 2015**. All questions and clarifications shall be answered and posted as an addendum to the HACSB website (<http://ww2.hacsb.com/business>)

**Disputes**

In case of any doubt or differences of opinions as to the participation sought hereunder, or the interpretation of the provisions of the RFI, the decision of the HACSB shall be final and binding upon all parties.

**Information Requested****Intent**

It is the intent of these specifications, terms and conditions to describe DISASTER RECOVERY AND BUSINESS CONTINUITY/EMERGENCY PLANNING CONSULTING SERVICES required by the Housing Authority of the County of San Bernardino (HACSB). HACSB would like information and constructive feedback to assist us in the determination of general project approach and budgetary requirements to have a complete and concise Disaster Recover and Business Continuity/Emergency Plan. The information gathered will assist the HACSB in the development of a Request for Proposal.

**Introduction**

The Housing Authority of the County of San Bernardino (HACSB) consists of 11 departments which includes approximately 130 employees. The agency serves the needs of roughly 30,000 residents in the County of San Bernardino, managing more than 10,000 housing units. The HACSB is the largest provider of affordable housing in the County.

Roughly 400 natural disasters occur each year affecting millions of people. As many of these disasters strike without warning, it's important to have plans prepared to minimize the impact of disasters to our staff, residents, information and communication systems, data, and documents. It is also important to continue the vital operations necessary to maintain our commitment to empower families to achieve an enriched quality of life through providing housing opportunities.

HACSB would like to develop a comprehensive Disaster Recovery and Business Continuity Plan that provides for immediate responses to emergencies and agency-wide plans to quickly bring operational functions back online based on priority.

**Purpose**

It is the intent of the Housing Authority of the County of San Bernardino to locate and solicit information from qualified Consultants and firms who possess the expertise and capability to complete a comprehensive Disaster Recovery and Business Continuity Plan.

HACSB would like to solicit information through a Request for Information (RFI) process to determine the best approach to have a comprehensive plan, either by updating and consolidating our current plans or by developing a new plan.

### Option 1: Update and Consolidate our Current Plans

HACSB currently has multiple plans for emergency operations, backup and retention plans. In addition, each location maintains individual safety and evaluation procedures as well as guidelines for emergency situations. HACSB would request a review of the current plans and recommendations for needed improvements based on best practice standards from public and private sector organizations with similar size and scopes of work. Additionally, the consultant will compile and consolidate the existing Emergency Management Plan, Backup and Retention Plan, along with the Business Continuity plan(to be created by consultant); into a comprehensive “Disaster Recovery and Business Continuity” plan.

### Option 2: Create a Comprehensive Disaster and Business Continuity Plan

Identify HACSB stakeholders, gather information, and draft a comprehensive Disaster Recovery and Business Continuity Plan. The plan shall be a single all-inclusive plan which includes disaster recovery, business continuity, implementation and staff training.

### Both Options 1 and 2 will require the following elements:

Business Continuity – HACSB requests the development of a comprehensive Business Continuity Plan for the agency’s various offices, facilities, and units. This plan should incorporate best practice standards from public and private sector organizations with similar size and scopes of work.

Final Product – The complete Disaster Recovery and Business Continuity Plan should be one all-inclusive plan which incorporates disaster recovery, business continuity, , implementation, staff training, and maintenance.

In order to provide a better understanding of our organization we have also included the following sections to enhance the understanding of our organization:

1. Executive Organizational Chart
2. Individual department summaries which includes detailed information regarding number of employees, locations/jurisdictions, and priority operational function.

## **Pricing**

Pricing shall be provided separately for the following deliverables:

1. Option 1- Update and consolidate our current Emergency and Backup and Retention plans, create a business continuity plan, create an all-inclusive Disaster and Business Continuity Plan, implementation, staff training and maintenance.
  - a. Complete Business Continuity Plan
  - b. Review current components and provide recommendations based on best practice standards
  - c. Incorporate all components into one comprehensive plan including implementation, training, and maintenance.
  - d. Complete onsite implementation and training
  
2. Option 2- Create a comprehensive Disaster Recovery and Business Continuity plan, implementation, staff training and maintenance.
  - a. Identify HACSB Stakeholders
  - b. Gather information from stakeholders
  - c. Draft a comprehensive Disaster Recovery and Business Continuity plan including implementation, training, and maintenance.
  - d. Complete onsite implementation and training

**EXHIBIT C**

**Contact Information Form**

To: Angie Lardapide, Procurement and Contracts Department  
Email directly to [alardapide@hacsb.com](mailto:alardapide@hacsb.com)

**RFI (PC854) Disaster Recovery and Business Continuity/Emergency Planning Consulting Services**

Vendor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Contact/Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**I PLAN TO SUBMIT A BID.**

- Yes, I will be submitting a bid.
- Maybe, I need to research and get more information (contact HACSB-information listed above)

**NO BID.** Indicate *any* of the following. We:

- Do **NOT** desire to be retained on the vendor list.
- Desire to be retained on the vendor list, but decline to bid based on the following:
  - Cannot comply with specifications/scope of work, Explain: \_\_\_\_\_
  - Cannot meet delivery requirements, Explain: \_\_\_\_\_
  - Do not regularly provide this type of product/service
  - Other, Explain: \_\_\_\_\_
  - Please update my information as listed above.

**HOW YOU FOUND OUT ABOUT THE BID.** Indicate *any* of the following. We:

- Checked the agency website
- Received notice by fax or e-mail
- Newspaper Ad, please list paper: \_\_\_\_\_
- Trade Publication, please list: \_\_\_\_\_
- Plan Room, please list: \_\_\_\_\_
- Website: \_\_\_\_\_

EXHIBIT D

**RESPONSE FORM  
DISASTER RECOVERY & BUSINESSCONTINUITY/EMERGENCYPLANNING  
CONSULTING SERVICES  
RFI #PC854**

Vendor Name: \_\_\_\_\_

To: The Housing Authority of the County of San Bernardino  
715 E. Brier Drive  
San Bernardino, CA 92408

1. The undersigned, having familiarized themselves with the local conditions affecting the cost of the work, and with the Specifications, if any thereto, hereby proposes to furnish a budgetary quotation for Disaster Recovery & Business Continuity Consulting Services as described in the Scope of Work in accordance therewith, for the estimated sum of:

**Cost:**

<b>Options:</b>	<b>Estimated Pricing Range:</b>
Business Continuity Plan using existing Emergency Plan:	\$
Complete New Business Continuity & Emergency Plan:	\$

**\*\*Please include any additional notes or details needed for pricing\*\***

2. In submitting this response it is understood that the right is reserved by the Housing Authority of the County of San Bernardino to reject any and all responses. If written notice of the acceptance of this response is mailed, telegraphed, faxed, or delivered to the undersigned within thirty (30) days after the opening thereof, or at any time thereafter before this response is withdrawn.

**NOTE: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.**

Date \_\_\_\_\_, 20\_\_\_\_ \_\_\_\_\_  
(Company Name)

\_\_\_\_\_ \_\_\_\_\_  
(Official Address) (By)

\_\_\_\_\_ \_\_\_\_\_  
(Title)

\_\_\_\_\_ \_\_\_\_\_  
(Contractors State License Number) (Telephone Number)