
BCM and DRP - RFP Template

The Supreme Council of Information & Communication Technology 'ictQATAR'

PUBLICATION DATE

Document Reference

This document should be used as an example of the contents of an RFP for business continuity management (BCM) and Plant disaster recovery management (P-DRM) consulting services. It is not intended to be comprehensive or exhaustive. However, it is intended to get you started by providing the technical and operational content that we find most useful to clients. Reference should be made to any enterprise procurement and legal guidelines, and the RFP should undergo appropriate internal review and approval.

Introduction and Background

Provide a brief introduction of the plant or business unit to be covered, the industry it is in, the nature of its operations, the objectives, and the scope of services required. < XYZ >

Some explanation of the current state of your BCM or P-DRM program would be appropriate, as well as the challenges that you are facing in regard to your firm's ability to establish a strong program or to recover from a disaster that it has experienced.

Next, document the high-level scope of the work, for example:

- <Your organization's> is seeking to develop or update our existing business continuity plan and/or IT disaster recovery plan to ensure that each meets the needs of our evolving business.
- The prerequisite business impact assessment (BIA) and resulting analysis of our business requirements will help identify the systems, assets and services that are needed following the occurrence of disruptive events.
- One or more hosting facilities/solutions that can provide the necessary equipment, space, connectivity and security to act as an alternative location "if any".

If there are any specific areas out of scope, it would be worth mentioning them as well.

Legal Statements

Some enterprises' legal departments want to include a statement as part of the RFP that states that the RFP does not represent a final statement of requirements, that it is subject to change and that the enterprise reserves the right to make changes, with the caveat that all bidders will be informed of any such changes. You might also include statements related to confidentiality and nondisclosure. Refer to your own enterprise guidelines, and legal and procurement department guidelines.

RFP Response Guidelines

Outline the process of managing the RFP, and provide contact details. For example:

- You must acknowledge receipt of this RFP and confirm your intention to respond by <Date 1>.
- All responses should be received by <Date 2> (ideally, allow consulting firms four weeks to respond).
- All responses and questions should be directed to <Member1>>> via email (<member1@qatar.net>).
- It is the responsibility of the company submitting a reply to this RFP to ensure that <your organization> is in possession of the documents prior to the deadline stated above.
- Please make explicit and clear any assumptions you have to make in your response.

- Proposals will include pricing, and will indicate whether the pricing is firm and what assumptions will alter pricing.
- You may submit a proposal for all or part of the requested services; however, < *Your organization's* > preference is for a proposal that meets all its requirements, whether as a single supplier or as part of an alliance.
- Timetable:
 - Call for RFPs: <Date 1>
 - Close RFPs: <Date 2>
 - Complete clarification and evaluation of proposals: <Date 3>
 - Award contract: <Date 4>

Scope

The service scope of the RFP is defined in this section. Specifically, < *Your organization's* > seeks BCM and P-DRM consulting services that will perform the following tasks (Note: In addition to these tasks, you must define the boundaries of the engagement — for example, all locations or just one, all business processes or just one and so forth.):

- **Assess < *Your organization's* > existing BCM and P-DRM capabilities:**
 - Determine the viability of < *Your organization's* > crisis management program.
 - Determine < *Your organization's* > ability to recover critical systems and processes from significant business disruptions.
 - Identify areas of strength, gaps and opportunities related to < *Your organization's* > existing BCM and P-DRM capabilities.
 - Compare < *Your organization's* > BCM and P-DRM programs to leading practices, and to pertinent regulatory requirements and industry standards, SUCH AS:
 - Qatar's National Industrial control systems security Guidelines.
 - BS-25999, NFPA 1600 (or other BCM related standards).
 - Future national Laws
 - Conduct a review of our supply chain availability risk management capability.
- **Identify critical systems and processes — conduct BIA and risk assessment (RA):**
 - Identify the potential impact over time resulting from an interruption in each of < *Your organization's* > functions.
 - Identify the information technology systems that provide essential support for < *Your organization's* > critical business and plant operation functions.
 - Establish recovery time objectives (RTOs) for each of < *Your organization's* > plant operation functions.

- Establish RTOs and recovery point objectives (RPOs) for each of < *Your organization's* > IT systems.
- Assess the risks at each of < *Your organization's* > critical facilities, and make recommendations to avoid or mitigate risks that could manifest themselves into an interruption of critical business functions.
- Align the BIA report with the structure and terminology contained in a recognized international BCM standard, such as BS 25999.
- **Identify implementation requirements and methods:**
 - Identify gaps between recovery requirements outlined in the BIA and < *your organization's* > existing recovery capabilities.
 - Identify activities required to implement the BCM and P-DRM programs, and to meet the recovery requirements identified in the BIA.
 - Produce two or more alternative implementation approaches to implementing the BCM and P-DRM capabilities, based on alternative levels of resources, risk tolerance and implementation methods.
- **Develop BCM and P-DRM policies and standards:**
 - Define program objectives, program structure and responsibilities for the BCM and P-DRM programs.
 - Identify critical success factors and key performance indicators for the BCM and P-DRM programs.
 - Define governance and oversight structure for the BCM and P-DRM programs.
 - Define processes and standards for key business BCM and P-DRM functions.
- **Initiate training and awareness:**
 - Develop a training and awareness plan to build knowledge and awareness of key participants and stakeholders around the BCM and P-DRM programs.
 - Construct training and awareness materials to be used by < *your organization* > and the vendor, consistent with the training and awareness plan, and the policies and standards.
 - Deliver live training sessions to key < *your organization* > participants and stakeholders of the BCM and P-DRM programs.
- **Conduct an exercise of < *your organization's* > BCM or P-DRM plan:**
 - Develop an exercise plan that will test the viability of < *department/location/business process's* > recovery plan.
 - Construct exercise materials to be used by < *your organization* > for this exercise.
 - Facilitate the exercise.
 - Deliver an after-exercise report highlighting all successes and known gaps and inconsistencies with the plan, based on the results of the exercise.

- Give a presentation to executive management on the exercise results and suggestions for improving *<your organization's>* recovery posture.

Selection Criteria

Describe how the winner will be selected and the criteria that will be used. For example:

- *<Your organization>* will select the supplier that provides the proposal that most closely meets its needs. *<Your organization>* will not be bound to accept the lowest-priced proposal, or any of the proposals received.
- *<Your organization>* will make its selection based on the following criteria, which will be weighted based on the factors considered to be most important. However, *<your organization>* reserves the right to change these criteria at its discretion, without notification:
 - Responses to the consultant questionnaire contained in *<Section XX>*
 - An assessment of the consulting firm's ability to address *<your organization's>* BCM and P-DRM needs
 - Professional backgrounds and related experience of the consultants assigned to the *<your organization>* project
 - Clarity and completeness of key project milestones and deliverables
 - Costs over the full contract term
 - Flexibility of contract terms and conditions
 - Transparency of the cost implications of midcontract changes, such as additional locations, increased capacity or platform changes, and the extent to which the proposal addresses *<your organization's>* risks associated with changes during the course of the contract
 - Speed with which required consulting resources can be made available to *<your organization>* to begin the project
 - Ability of bidder to meet future needs of *<your organization>* during the term of any ensuing contract
 - Availability of and response(s) from the consulting firm's references
 - Size/viability of the firm
 - Experience of the firm's consultants in BCM or P-DRM, as well as *<your organization's>* industry, and in supporting applications servicing *<your organization's>* business operation
 - Professional background and relevant industry experience of the consulting team specifically assigned to this project
 - Personal certification of the firm's consultants
 - Whether the firm has obtained certification to conduct BCM framework audits, such as BS-25999.
 - Experience in delivering concepts to executive management

- Geographic support for operating locations
- Scenario-specific knowledge
- Regulatory knowledge support
- Frameworks/standards support
- Partnerships with BCM,P-DRM and IT organizations;
- Practice management methodologies: marketing, program deliverables, quality metrics
- Guarantee for services performed

You may choose to remove several of these, or add any other issues that are relevant to your specific circumstances.

Proposal Summary

- Summarize your proposed form of engagement.
- Who are the key personnel and what are their qualifications?
- Please provide a short schedule of major activities, from initiation to delivery of final report.
- How many individuals/hours of effort do you anticipate?
- Please provide a typical example of a report from a similar engagement.

References

Request at least three references from clients whose company size and vertical industry are similar to your own. We especially recommend speaking to at least one organization for which a similar project was recently completed .The kinds of questions we'd recommend getting answered include:

- How well did the consulting firm keep to schedule and deliver high-quality content?
- How knowledgeable and experienced were the firm's consultants?
- Did the firm switch consultants at anytime during the engagement? Was this change clearly explained in advance?
- How effective was the knowledge transfer from the consultants to your internal team?
- Was your organization able to successfully implement the consultant's recommendations? Did the recommendations actually prove useful over time, or did they turn out to unrealistic or inappropriate?
- How confident do you feel about advancing your organization's BCM and/or P-DRM programs as a result of the consulting engagement?
- Can you count on the consultant's assistance should a disruptive event occur in the future? In which areas would the consulting firm be best-positioned to enable your organization to effectively resume business operations?

Pricing

If you want the bidder to respond in a particular format or layout, specify it here. It is not reasonable to expect the bidder to price the firm's professional service charges on a daily or weekly basis. However, it is reasonable to request that the bidder break down its charges by either major milestones and/or deliverables.

Contract Terms and Conditions

Request a copy of the bidder's standard terms and conditions.

Additional Information

This is your opportunity to gather any additional information that you have not already gathered elsewhere.

Vendor Profile and Services

Provide a brief overview of your company, including the products and services offered, including:

- Crisis management consulting services
- BCM consulting services
- P-DRM consulting services
- Government partnerships (If possible)
- Managed disaster recovery services
- Colocation and hosting services
- Managed IT services
- History — How many years have you been providing BCM consulting services?
- History — How many years have you been providing P-DRM consulting services?
- What percentage of your total revenue comes from BCM consulting services?
- What percentage of your total revenue comes from P-DRM consulting services?
- How many full-time employees provide BCM consulting services?
- How many full-time employees provide IT-DRM consulting services?
- What percentage of your organization's BCM consultants are full-time employees, and what proportion are part-time employees or contractors?
- What is your customer service philosophy, and how is that philosophy reflected in your service offerings?

Experience and Certifications

- What proportion of the full-time consultants in your organization are certified by the Business Continuity Institute (BCI), the Disaster Recovery Institute International (DRII) or as a lead auditor by the International Standards Organization (ISO)?

- Indicate the proportion of consultants in your organization that have each of the following areas of domain expertise in crisis management:
 - Crisis Communications
 - Emergency Notification
 - Emergency Response Management
 - Application Recovery
 - Data Backup and Recovery
 - Telecommunications Services
 - Voice Recovery
 - Data Network Recovery
 - Work Area Recovery

- Indicate the proportion of the consultants in your organization that have each of the following areas of domain expertise in business-related recovery:
 - Aligning Practice Methodology to Customer Organization and Culture
 - Organization and Staffing
 - BCM Charter and Policy Development
 - BCM Business Case Development
 - BCM Investments and Budget Management
 - Business Recovery
 - Supply Chain Availability/Contingency Planning
 - Pandemic Preparedness Planning
 - Recovery Data Center Architecture
 - Recovery Data Center Site Selection
 - Recovery Data Center Site Build-Out
 - Physical Security

- Indicate the proportion of the consultants in your organization that have each of the following areas of risk domain expertise:
 - Information Security
 - Data Privacy
 - Compliance (legal, regulatory, etc.)
 - Risk Assessment

- BIA
- Recovery Strategy Development
- Recovery Program Management
- Recovery Solution and Plan Management
- Organizational BCM Certification
- Metrics Development/Program Performance Reporting
- Recovery and Continuity Exercise Support
- Critical Infrastructure Information Protection
- Industrial Control Systems (ICS) Risk Management
- Which of the following certifications has one or more BCM and/or DRM consultants in your organization received?
 - Certificate of the Business Continuity Institute (CBCI)
 - Specialist of the Business Continuity Institute (SBCI)
 - Associate Member of the Business Continuity Institute (AMBCI)
 - Member of the Business Continuity Institute (MBCI)
 - Fellow of the Business Continuity Institute (FBCI)
 - Associate Business Continuity Professional (ABCP)
 - Certified Business Continuity Vendor (CBCV)
 - Certified Functional Continuity Professional (CFCP)
 - Certified Business Continuity Professional (CBCP)
 - Master Business Continuity Professional (MBCP)
 - Certified Business Continuity Auditor (CBCA)
 - Certified Business Continuity Lead Auditor (CBCLA)
 - Certified Business Resilience Manager (CBRM)
 - IT Infrastructure Library (ITIL)
 - Project Management Professional (PMP)
 - Certified Information Systems Auditor (CISA)
 - Certified Information Systems Security Professional (CISSP)
 - Emergency Management
 - Facility Management

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- Vendor-specific certifications (please specify)
 - Indicate how your consultants break down by years of experience in BCM and/or DRM consulting (by percentage):
 - Less than 2 years (X%)
 - 2 years to less than 5 years (Y%)
 - 5 years to less than 10 years (Z%)
 - 10 years to less than 20 years (XX%)
 - 20 years or more (YY%)

Vertical Domain and Geographical Coverage

- In which of the following vertical industries does your organization have BCM and/or P-DRM consulting service delivery experience? *<Remove all industries that do not apply to your organization.>*
 - Natural Resources — Energy Resources and Processing
 - Natural Resources — Other (Mining, Wood, etc.)
 - Utilities — Electric and Gas
 - Utilities — Water
 - Utilities - Smart Grid
 - Other (please describe)

Service Delivery Quality

- Which of the following metrics does your organization use to measure consulting services delivery quality?
 - Reduced service delivery cycle time
 - Reduced service delivery cost
 - Reduced project management cost
 - Increased billable consultant time
 - Improved client satisfaction
 - Reduced project delivery cost
 - Number of client success stories
 - Other (please specify)

Service Delivery Partnerships

- Please list the firms (if any) with which you regularly partner to deliver the following (by service):

- BCM Planning
- Contingency Management
- Crisis Management
- Emergency/Mass Notification
- Emergency Management
- P-DRM Planning
- Information Security
- Pandemic Planning
- Risk Assessment
- Other (please specify)

Engagement Deliverables

- Identify the typical deliverables of your services:
 - Final report
 - Presentation to client management
 - Business Continuity-specific business case
 - Plant disaster recovery-specific business case
 - Client staff training
 - Continuity management software (please identify specific vendors and products)
 - Other (please specify)

Support Services

- Indicate the number of support staff personnel (and their positions) at the recovery site during testing and actual disaster recovery, including:
 - Account management
 - Customer care specialists
 - Resource management support
 - Test setup support
 - Test and disaster support
 - IT operations support
 - System engineering support
 - Network and telecommunications support

- Describe the end-user support areas available with a hot-site subscription for subscriber personnel. Is this area shared with other customers?
- What support services are contractually guaranteed at the time of a disaster?
- Provide examples of successful recoveries.
- What services are provided as part of a standard recovery contract, and what services are available for an additional fee?
- How do you keep subscribers informed of new products/services?