



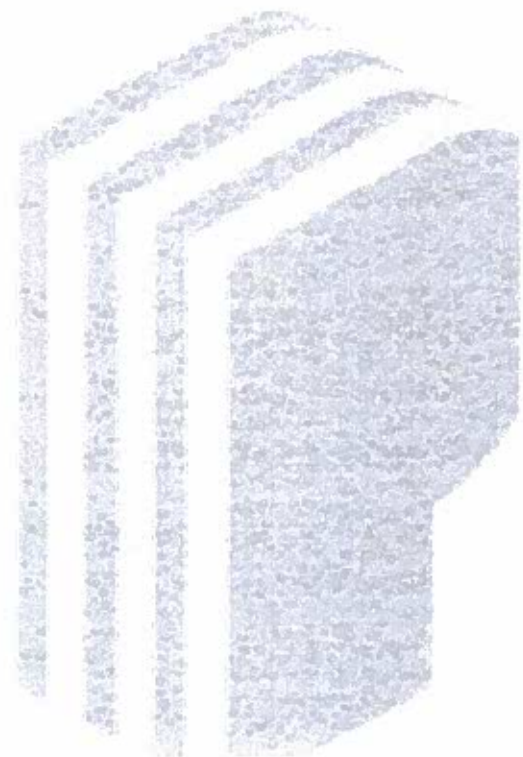
**Peguis First Nation
Surrender
Claim Trust**

REQUEST FOR PROPOSAL

**REQUEST FOR PROPOSAL (RFP)
Cloud Migration Project**

**PEGUIS SURRENDER CLAIM TRUST
Box 942
PEGUIS, MB, R0C 3J0**

FEBRUARY 3, 2025





Peguis First Nation Surrender Claim Trust

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1. SUMMARY AND BACKGROUND

The Peguis Surrender Claim Trust represents one of the largest settlements of its kind in the history of Canada. Established in 2010 to receive, invest, manage, and administer the assets of the Trust for the benefit of the beneficiaries, Peguis First Nation, and its members.

Peguis Surrender Claim Trust is currently accepting proposals to migrate current IT solutions to the cloud. The proposed migration from the local server to Microsoft 365 (M365) Business Premium cloud services to mitigate server obsolescence.

2. PROPOSAL GUIDELINES

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5pm CST February 14th, 2025. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP.

3. PROJECT PURPOSE AND DESCRIPTION

The Project is currently on a local server due to unreliable internet connections and has since been transferred to Starlink.

- Migrate Trust files from the local server to M365 Business Premium cloud services.
- Migrate Trust email services from Backstage to the M365 Outlook client application and Exchange Online services.
- Transition critical user and business applications to the cloud.
- Implement the necessary security and backup services to ensure the integrity and confidentiality of data.
- Implement Starlink static IP address to support cloud migration and to resolve the "scan to email" issue on a Xerox printer.
- Document Trust IT policies and procedures for IT processes affected by migration.
- Train users in the new IT applications and services.



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Project Description:

The project will streamline operations, improve accessibility, and enhance security. In addition, the Trust wishes to use this project to document IT policies and to train Trustees and staff in new or changed procedures.

4. PROJECT SCOPE

Subject	In-Scope	Out-of-Scope
File Server and Management	Migrate Trust files from file server to SharePoint. Decommission file server. Use Datto SaaS Backup to backup all cloud files with indefinite retention.	Ongoing monitoring of Datto SaaS back up
IT Network Security	Replace the unmanaged switch with a managed Layer 3 switch to give some insight into network operations and events and to act as a backup for primary devices. Move Dynamic Host Configuration Protocol (DHCP) and Domain Name System (DNS) roles to the firewall. Document IT network security policies and procedures managed by network configuration and monitoring service provider.	Ongoing network monitoring
Identity and Access Management	Convert User Accounts to M365 Business Premium. Implement multi-factor authentication (MFA) for all user logins. Document User Identity and Access Management policies and procedures. Train users in new or changed Identity and Access Management procedures.	Help desk support
Subject	In-Scope	Out-of-Scope
User Device Management and	Transition of user and device management to M365.	Ongoing management of cloud and



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Information Protection	<p>Convert user laptops and smartphones to M365 applications and services where required.</p> <p>Transition of user files to OneDrive.</p> <p>Document User Device and Information Protection policies and procedures.</p> <p>Train users in new or changed User Device Management and Information Protection procedures.</p>	<p>installed user applications.</p>
Email and Contact Management Services	<p>Migration of email accounts, emails, contacts and calendars from Backstage Email server to M365 Exchange Online service. Trust is currently using 10 email addresses.</p> <p>Document Email and Contact Management and Calendaring Policies and Procedures.</p> <p>Train users in Outlook Email, Contact and Calendar management.</p>	<p>M365 Task Management services (currently using Notes)</p>
Collaboration Management	<p>Set up of Microsoft Teams and SharePoint for Cloud Migration Project Management purposes.</p> <p>Training project staff in Teams and SharePoint file management, meeting management and chat features. (Currently using Server/Own Cloud for file sharing).</p>	<p>Use of Teams for routine staff collaboration.</p>

5. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

Proposal Due	5:00 pm February 14th, 2025
Proposal Evaluation Completed	March 3 rd , 2025
Select Bidder	March 3 rd , 2025
Contract Negotiations Completed	March 14 th , 2025
Project Completion	March 31 st , 2025

6. BUDGET

All proposals must include proposed costs to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly



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recurring costs (MRC). Pricing should be listed for each of the following items in accordance with the format below:

NOTE: All costs and fees must be clearly described in each proposal.

7. BIDDER QUALIFICATIONS

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in overall project scope
- Examples of 3 or more corporate projects implemented by your organization or testimonials from past clients
- Anticipated resources you will assign to this project (role, title, experience)
- A full testing plan
- Timeframe for completion of the project

8. PROPOSAL EVALUATION CRITERIA

Peguis Surrender Claim Trust will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- Overall proposal suitability: proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- Organizational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Bidders will be evaluated on examples of their work client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

Each bidder must submit copies of their proposal to the address below by February 14, 2025 at 5pm EST:

Peguis Surrender Claim Trust
Box 942
Peguis, MB R0C 3J0
trustmanager@peguissurrendertrust.com