

## REQUEST FOR PROPOSALS

### INTRODUCTION

Micro Finance Zambia Limited (MFZ) is seeking proposals from experienced and qualified vendors for the supply, delivery, installation, and commissioning of an **Offsite Record Management Solution and Document Management System**. The goal is to ensure that we integrate technological advancement in our daily operations and ensuring business continuity throughout our organization.

### Consolidated RFP Submission Requirements

#### 1. General Company Information

- Legal registration and valid operating license
- Company profile and ownership details
- Years in operation and relevant industry experience
- Client base (especially within financial services or regulated sectors)
- References from similar projects (minimum 2–3 corporate references)
- Local presence and technical support coverage across Zambia
- Contact person and official communication details

#### 2. Technical Proposal Requirement

##### A. Offsite Records Management Solution

- Secure, climate-controlled storage facilities with fire protection and restricted access
- 24/7 monitored and alarmed premises
- **Chain-of-Custody Tracking** using barcoding and inventory management
- Digital portal for record tracking and requests
- **Records Retrieval & Delivery Options:** next-day, same-day, emergency, and scan-on-demand
- **Will-Call Pickup:** on-site viewing in a secure dedicated room
- Retention schedule management with automated destruction alerts
- Certified destruction services (with Certificates of Destruction)
- Compliance with privacy, data protection, and regulatory standards
- Scalability and system integration capability for future upgrades

##### B. Document Management System (DMS)

- **Core Capabilities:**
  - Digital archiving and scanning of physical documents
  - Metadata tagging and OCR-based search
  - Role-based access, version control, expiry alerts, and retention policies
  - Upload and secure storage of digital documents from Flexcube, onboarding portals, and third-party apps
- **Integration Requirements:**
  - API connectivity with Flexcube and digital onboarding systems
  - Integration with workflow tools and HR/document processes
- **Security and Compliance:**
  - Encryption in transit and at rest
  - Role-based access with audit logging
  - Backup and disaster recovery
  - Adherence to BoZ and data protection laws

- **Technical Features:**
  - Modular, scalable architecture
  - Full-text search and document indexing
  - On-premise or cloud storage with automated backup
  - Web and mobile access (optional)
- **Environmental Sustainability:**
  - Supports paperless office initiative and digital workflows

### 3. Project Management & Implementation

- Detailed **implementation plan**, timelines, and milestones
- **User training** and knowledge transfer plan
- **Post-deployment support** and maintenance strategy
- Change management and escalation process
- Reporting and communication framework

### 4. Financial Proposal

- **Itemized cost breakdown** (installation, licensing, equipment, support, and maintenance)
- Recurring monthly or annual fees
- Optional services or modules with separate pricing (e.g., failover link, mobile OCR module)
- 5-year **Total Cost of Ownership (TCO)**, showing fixed and variable costs
- Cost adjustment clauses for user or storage expansion
- Contract duration and renewal terms

### 5. Evaluation Criteria

- Technical compliance with requirements
- Service Level Agreements and response mechanisms
- Experience and client references
- Solution scalability, security, and compliance
- Cost competitiveness and transparency
- Local support and infrastructure coverage

### 6. Service Levels, Support & Maintenance

- Support hours: 24x7 for Priority 1 incidents; business hours for lower priorities unless otherwise contracted.
- Incident response targets: P1 – response ≤ 1 hour, workaround ≤ 4 hours, resolution ≤ 24 hours; P2 – response ≤ 4 hours, resolution ≤ 2 business days; P3 – response ≤ 1 business day, resolution ≤ 5 business days.
- Service availability: 99.9% monthly for production services.
- Preventive maintenance, patching schedules, and security update policy disclosed before go-live.
- Escalation matrix with named contacts and on-call arrangements; quarterly service reviews with KPI reporting.

### 7. Submission Details

- **Submission Format:** Technical and Financial proposals (separate)
- **Deadline:** 26<sup>th</sup> December 2025, 3PM
- **Submission Method:** Email to: [admin@mfz.co.zm](mailto:admin@mfz.co.zm)
- **Suppliers should engage with our social media platforms for more opportunities.**  
Kindly indicate which RFP you are responding to in the subject of your email using the following codes:
  - **ORMS- Offsite Records Management Solution**
  - **DMS- Documents Management System**
- Supporting documents to be attached (licenses, references, certifications, etc.)
- Engage with our social media platforms for more opportunities.