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RFP-AFI-2024-21

Request for Proposal

Provision of Professional Consultancy Services for the
Design, Configuration, Customization and
Implementation of AFI SharePoint

Data	Specific Instructions / Requirements
RFP Issuance Date	30 August 2024
Proposal Submission Deadline	18 September 2024
Notification of Award Decision	October 2024
AFI Contact Details (submitting questions & proposal)	Procurement & Contracts Office E-mail address dedicated for this purpose: RFP2421@afi-global.org

Alliance for Financial Inclusion

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1. Background:

The Alliance for Financial Inclusion

The Alliance for Financial Inclusion (AFI) is an organization established as a member-owned network under the International Organizations (Privileges and Immunities) Act 1992 of Chapter 485 of the Laws of Malaysia. Our head office is based in Kuala Lumpur, Malaysia with offices in Luxembourg and Abidjan. The AFI network spans over 81 countries and 100 financial inclusion policy-making and regulatory institutions. AFI is a policy leadership alliance owned and led by member central banks and financial regulatory institutions with the common objective of advancing financial inclusion at the country, regional and international levels. AFI partners with regulators, international organizations and private sector leaders to drive practical solutions and facilitate the implementation of impactful policy changes through its cooperative model that embeds peer learning, knowledge exchange and peer transformation. Please visit AFI's official website at <https://www.afi-global.org> for more information.

2. Project Background:

AFI operates on Microsoft 365 Business Standard subscription platform which includes SharePoint Online infrastructure. The current SharePoint serves as a document storage with primary users is within AFI employees.

AFI is now inviting proposals from companies with a track record of success in SharePoint online design, configuration, customization and implementation. The contract will include one-year technical support and maintenance following launch and is potentially extendable.

3. Overall Objective:

SharePoint consultants to work closely with AFI employees to understand their unique requirements and challenges. They design and implement customized SharePoint solutions that align perfectly with AFI's goals and processes, ensuring optimal performance and user satisfaction.

The overall SharePoint solutions is segregated into three parts:

- (a) SharePoint for Knowledge Management
- (b) SharePoint for Workflow Management
- (c) A custom-made SharePoint Intranet

SharePoint consultants to offer comprehensive user training and ongoing support to ensure smooth adoption and usage of the newly developed SharePoint. This empowers employees to make the most of SharePoint's features, maximizing its impact on the organization.

4. Scope of Work:

The selected consulting firm is required to deliver the following scope of work:

Stage 1: Discovery and analysis

SharePoint consultants to study AFI current SharePoint layout, user requirement gathering stage understanding AFI's goals and processes, corresponding workflows, customization requirement and integration with third-party tools. Analyze AFI's work processes, for example document management and select relevant SharePoint functionality to streamline them.

Stage 2: Design

This stage consists of creating a solution according to AFI's needs. This includes building an information architecture that matches AFI's content to certain SharePoint sites. SharePoint consultants to present their proposal on the new solutions to AFI stakeholders for their input and approval.

Stage 3: Configuration and customization

This is the stage where SharePoint is configured based on approved solutions presented earlier. SharePoint consultants to create sites and libraries, adds users, determines security groups, sets up metadata and views, builds navigation, etc. If SharePoint built-in site templates and functionality does not meet AFI's needs, custom features can be added to a solution.

Stage 4: User acceptance testing before going live

The stage involves testing of a SharePoint solution by a selected group of users. SharePoint consultants make changes based on the group's feedback, and then they make the solution available for all users.

Stage 5: Training

SharePoint consultants provide end users training on how to use SharePoint for their day-to-day activities in the form of, for example, instructor-led training, a video guide.

SharePoint consultants to develop user manuals and train AFI appointed SharePoint administrator to perform administrative and maintenance work of the SharePoint.

Stage 6: New SharePoint goes live.

5. Timeline and Deliverables:

The assignment is expected to be undertaken between October and December 2024. Below is a tentative timeline:

No	Deliverables/Activities	Tentative Dates
1.	Discovery and analysis	Oct 2024
2.	Design and Present Proposal of New Solutions	Oct 2024

3.	Configuration and customization	Nov 2024
4.	User acceptance testing before going live	Nov 2024
5.	Training	Dec 2024
7.	Develop User Manual	Dec 2024
8.	Train AFI System Administrators	Dec 2024
9.	New Site Goes Live	1 Jan 2025

6. Travel:

This assignment may require the consultant to travel. Please include the estimated local/ domestic travel expenses for the tasks as relevant.

7. Qualification:

The firm undertaking this assignment should have the following qualifications:

- A qualified and registered company in Malaysia.
- Minimum 5 few years of experience in development and implementation of SharePoint.
- Expertise in recommending and communicating appropriate technical solutions as evidenced by past proposals and references.
- Successfully completed similar projects especially in the area of Knowledge Management, Automate Workflow and Intranet and has the qualifications necessary to undertake this project.
- Excellent oral, writing and presentation skills in the English language is compulsory.

8. Reporting:

Throughout the contract period, the Consultant will be reporting to AFI's Head of Finance and work with AFI Information Technology (IT) unit which is currently outsourced to a third-party service provider.

9. Payment Terms:

The payment terms/schedule proposed for this consultancy are as following:

Deliverables	Percentage
Upon Signing of Contract	10%
Upon SharePoint Design Approval	20%
Upon Acceptance of User Manual and Training of System Administrator	40%
Upon New Site Going Live	10%
Post Live 30 days	10%
Total	100%

10.0 Administrative Information:

10.1 Disclaimer

The final decision on selection of a firm for this project rests with AFI management team and with the Inquiry. Only shortlisted and successful firms will be contacted.

10.2 Proposal Submission Information:

Proposals will be due with the following requirements for submission:

Submission Deadline:	18 September 2024
Documents to be submitted with Annexure 1 and 2:	
Firm	<ul style="list-style-type: none">• Company Registration;• Company Profile;• List of previous or current clientele on similar work;• CVs for all the team members to be deployed to AFI• References with email contact;• Joint-Agreement (if any);• Conflict of Interest Disclosure form;• At least one (1) sample work (link or attachments) if any
Method of Submission:	By email to AFI's Procurement & Contracts Office at RFP2421@afi-global.org
Submission of Technical and Financial:	Kindly submit the followings: <ol style="list-style-type: none">1. Using the template/format given in Annexure 1 (Technical) and Annexure 2 (Financial) and/or additional technical proposal for more information.2. Technical and Financial proposal must be separated in different pdf.3. Financial proposals must be MYR only. Whereas for Malaysian applicants with Business Registration under Suruhanjaya Syarikat Malaysia (SSM), please submit your financial proposals in MYR.4. Proposal to be submitted to the designated email address.5. AFI does not tolerate copyright infringement, including but not limited to infringement, in the form of plagiarism. Consultant or Consulting entity awarded a contract by AFI shall take responsibility to ensure that the authored works, produced in parts or as an entirety of the deliverables stated in this RFP does not infringe on copyrights.

AFI is not bound to accept the lowest quoted bid and reserves the right to disqualify incomplete submission, overlapping submission, non-compliance to the above requirements. Notification of results will only be sent to shortlisted candidates upon completion.

10.3 Retention of Proposals

All proposals submitted become the property of AFI. AFI will make all reasonable efforts to maintain proposals in confidence and will release proposals only to personnel involved with the evaluation of the project. Proprietary information should be identified in each proposal.

10.4 Evaluation Criteria

The proposals submitted will be evaluated based on the following criteria:

Technical Scoring		
1.	Company Background;	30%
	(a) Corporate Information	10
	(b) Technical Expertise	20
2.	Experience and technical competence of the key staff for the assignment;	40%
	(a) Qualifications	20
	(b) Experience	20
3.	Adequacy of the processes and methodology in responding to the Questions in Annexure 1 (Technical);	30%
	(a) Technical approach and Methodology	20
	(b) Support Architecture	10
Total:		100%

Evaluation of technical and financial proposals

AFI reserves the right to award the most suitable proposal based on the evaluation of combined criterion, where bidders are qualified by the combined valuation of the technical and financial proposals, with the following weightage:

- i) Technical Proposal: 70% (Seventy percent)
- ii) Financial Proposal: 30% (Thirty percent)