



## **TERMS OF REFERENCE TO PROVIDE AN ELECTRONIC DOCUMENT MANAGEMENT SYSTEM**

### **1. Background**

Sonarwa Life assurance company Ltd, is a Company duly registered under the laws of the Republic of Rwanda and licensed by the National Bank of Rwanda to carry out Life Insurance Business in Rwanda with its principal place of business at Road N: KN73, Plot KN 3 Av 23, P.O. Box 1774 Kigali-Rwanda, E-mail: [info@sonarwalife.co.rw](mailto:info@sonarwalife.co.rw), Tel.: +250 788 500 144.

### **2. Objectives**

The overall objective of this consultancy is to provide an electronic document management system for SONARWA Life Assurance Company Limited, the system should have a number of modules that are tightly coupled and interlinked.

### **3. Scope of Work**

The scope of work for the Consultant will include but not be limited to analysis of processes and procedures, reconfiguration and customization of EDMS, training and technology transfer, testing and rollout as per the technical requirements and outcome of the analysis.

**Electronic Document Management System** must cover the following modules:

- **Internal documents module:** This module deals with various institution's employee's daily applications like items requisition, mission approval, memo, appointment requests and many more internal applications and approvals.
- **External document management Module:** this one deals with all documents received and entered from outside the institution, with this feature one can track a document from the first destination until it is archived.
- **Electronic archiving/filing module,** it deals with archiving task electronically. With its powerful search engine, you can search and find any document previously entered in the system.

## **SYSTEM DESCRIPTION**

The system should be composed of the modules indicated in the technical specifications document.



## **BRIEF SYSTEM DESCRIPTION**

Sonarwa Life assurance company Ltd wants to acquire a digital archive solution which is an integrated package that provides the necessary tools in order to do the following:

- Empower the staff to be more productive by providing them with efficient functionalities for their day-to-day work, with regards to document management and digital archiving, for underwriting, claims processing, agency and general accounting, human resources & payroll management, internal & external communication, as well as customer relations.
- Automate document processing so that proposals, certificates, policy documents, and other key documents can be archived without delays.
- Provide an effective communication link between the company, the agents, and the clients in a seamless manner that promotes client and agents satisfaction.
- Provide real-time and online access to information needed for reporting, marketing, client and audit enquiries, management information needs, analysis, etcetera.
- Regulate, monitor and audit staff activities in relation to system operations, regulatory requirements, and operational rules relating to the business.
- Provide maximum security for the system against un-authorized access, internally and externally.

## **4. Deliverables**

The deliverables should be well-functioning, fully integrated digital archiving application that has been tested and deployed with the following:

- Digital storage of archives in PDF files.
- User and administrative manuals.
- Training reports validated by user departments.
- Maintenance and support plan.
- All other related documentations that have been validated by IT department project lead.

## **5. Timeline**

This implementation is expected to be carried out for a period of not more than 3 months from the date of engagement. Preference will be given to a short timeline.

## **6. Administrative Requirements**

- Company registration certificate.
- Valid Tax clearance certificate.;
- RSSB clearance if applicable.
- Brief description of the company (company profile) and its shareholding.
- A registered company with more than 5 years of experience in carrying out work related.
- A Cover letter.
- The successful bidder will provide performance guarantee of 5% before signing the contract.

## **7. Technical Requirements**

### **1. Qualifications and selection criteria.**

The following is a summary of the general considerations that will be used to determine the company:

- Company's capabilities and experience.
- Understanding of SONARWA Life's needs.
- Ability to communicate effectively.
- Client and industry references.
- Independence from conflicts of interest.
- Fees and compensation.

If interested in providing the specified services, please provide the following information:

- Complete information about proven experience.
- A list of projects (with proof) which indicate specific background and experience in the area being considered with key information and figures (e.g., on implemented works within the field of Financial/ Insurance companies).
- Furnish at least two big clients in the Financial or Insurance sectors including reference letters, contact persons and telephone numbers in the last 4 years. Before Final award of the tender, the selected bidders shall allow SONARWA Technical team to visit at least 2 companies which are using the system and also provide a way for a live demo of the system in which SONARWA Technical team can test the functionalities of the proposed system.
- A quotation of the proposed remuneration.
- A clear description of the methodology and work plan that the consultant proposes to execute the assignment.
- A timeline for carrying out the assignment.
- The overall score shall be obtained by adding the technical and financial scores. The weight of technical and financial score percentages shall be 70% and 30% respectively.
- Please provide any other items that you believe SONARWA Life should take into account.

## 2. Criteria and points for the evaluation of the technical proposal

### a. Experience of the company (max 20 marks)

The consulting company should have successfully implemented the similar systems into at least two (2) Insurance/ financial institutions covering functionalities as stated in the technical specifications document. Each completed assignment must be supported by a certificate of good completion and related contract (10 marks per completed assignment).

### b. Quality of methodology proposed and system capabilities (max 50 marks)

- Demonstrating understanding of the terms of reference. (Max 10 marks).
- Suitability of the methodology/implementation plan. (Max 10 marks).
- Completeness of the modules as stated in technical specifications (Max. 20 marks).
- Timeline for implementation/ duration (Max 10 marks for less than 3 months)

### c. Qualification and experience of key personnel proposed (max 30 marks)

*Note: Qualifications of the key staff must be supported by copies of degrees and Experience as well as signed CVs.*

Personnel	Requirements	Description	Marks
<b>Team Leader/Project Manager</b>	Qualification	The team leader should hold acceptable qualifications in IT project implementation or other relevant domain.	2 marks
	General experience	The team leader should have 10 years' experience in Software implementation.	0.2 marks per year ( <b>max 2 marks</b> )
	Relevant experience	The team leader should have vast experience in implementing digital archive systems and have managed 3 projects of such category as a minimum.	2 marks per assignment
<b>Team composition assessment (3)</b>	Qualification	Each expert on the exercise should have IT or other relevant certificates/qualifications depending on the assigned role.	2 marks each expert ( <b>max 6 marks</b> )
	General experience	The implementation team should have at least 8 years' experience on average.	1 marks per each year ( <b>max 8 marks</b> )
	Relevant experience	The team should have performed at least 2 implementations in the category of insurance/ financial institutions in the last 5 years	2 marks per completed assignment ( <b>max 6 marks</b> )

**Note:** The company should be able to communicate (speak and write) in English.  
The minimum technical score required to pass is 70 points.



## 7. Duration and reporting requirements

The activities will be performed within a period not exceeding 3 months. The consulting company will periodically report key information (at least on a biweekly basis) to the Chief Executive Officer or his delegated staff.

Bids comprising technical and financial offers properly presented will be received separately at SONARWA LIFE HQ at Road N: KN73, Plot KN 3 Av 23, P.O. Box 1035 Kigali-Rwanda not later than **9<sup>th</sup> October 2023 at 5:00 pm** indicating **"OFFER TO PROVIDE AN Digital Archiving system to**

**SONARWA LIFE Assurance Company". Detailed technical specifications shall be available on the website: <https://sonarwalife.co.rw> under tenders menu**

SONARWA LIFE deserves the right to not consider all the bids if they don't meet its expectations.

Enquiries related to this tender may be addressed to the [info@sonarwalife.co.rw](mailto:info@sonarwalife.co.rw) in writing by email not later than **12<sup>th</sup> October 2023**.

Done at Kigali, on 3<sup>rd</sup> October 2023.

  
**Dianah MUKUNDWA**  
Chief Executive Officer

